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ABSTRACT

The management enhancement team approach (META) is a team-driven management development program designed for managers within Australia's National Vocational Education and Training Sector (NVETS). META, which has been piloted at more than 70 sites across Australia, is designed to identify and address management development needs within the context of an organization's workplace. The META pilot's success was examined through a formative evaluation consisting of six case studies during which data were gathered from the following sources: group interviews with up to 15 staff from each case study site; questionnaires completed by state coordinators, directors of organizations using META, META advisers, and a sample of participants at each site; participants' responses to META evaluation newsletters; and a teleconference with steering committee members. META implementation and funding varied significantly by state/territory. Key organizational factors for META's success included support and proactive commitment by senior executives and allocation of sufficient time for advisers and teams to prepare for META. (Thirty-one tables/figures are included. Appended are the following: case studies; expected benefits from META when applying for funding; list of other management development programs nominated in the survey; strengths and difficulties related to META as perceived by advisers; and survey questionnaires.) (MN)

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National
Management
Development
Scheme

META

META

Evaluation Report

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Management
Enhancement
Team
Approach

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AUSTRALIAN
NATIONAL TRAINING
AUTHORITY

An Evaluation Report

Management Enhancement Team Approach (META) for the Australian National Training Authority

David J. Foreman & John G. Dunn

1997

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This report is part of a major program funded by the National Staff Development Committee (NSDC) of the Australian National Training Authority, the National Management Development Scheme. The evaluation concentrates on one phase of this project, the pilot implementation.

The authors wish to acknowledge the support of the State/Territory NSDC Coordinators who provided the contacts with case study sites, collected information on the implementation of META in their jurisdiction, distributed newsletters and questionnaires and followed up the questionnaires on their behalf. In addition, Ian Gribble in Victoria and Chris Matthews in South Australia arranged meetings between the evaluators and advisers.

Our thanks also go to the management and staffs of the six organisations who participated in the case studies, and reviewed the draft studies.

Also we appreciated the time spent by the many META team advisers throughout Australia, who distributed, followed up and collected the questionnaires, as well as completing their own. Thank you for the many telephone calls and faxes during this time.

The Steering Committee, John Kelleher, Ian Gribble, Linda Lawrie and Simon Wallace have provided valuable and timely advice and support during this project.

Executive summary

Background

The Management Enhanced Team Approach (META), the focus of this evaluation, is a team-driven management development scheme designed for managers within the National Vocational Education and Training Sector (NVETS). It has been developed by the National Staff Development Committee of the Australian National Training Authority (ANTA) and has been piloted in over 70 sites around Australia.

There are two major aspects of META, the first being META as a *product*, designed to identify and address management development needs within the context of an organisation's workplace. The second aspect is the *scheme*, which includes agreements with State/Territory Training Authorities, META adviser training workshops and supporting grants to participating organisations, to initiate the implementation of META nationally. Both the product and the scheme are addressed in this evaluation.

Approach to the evaluation

The purpose of the evaluation has been *to gauge the success of the pilot implementation phase of the scheme to date, in order to inform product improvement, future policy development, future resourcing decisions and contribute to a continuous improvement cycle.*

The evaluation has been formative, providing feedback to key stakeholders (including participants) throughout and enabling ongoing improvement through the sharing of information during visitations, meetings and Evaluation Newsletters. The evaluation has involved a responsive approach, allowing the consideration of issues or concerns of interest to stakeholders arising during the evaluation.

A major component of the evaluation has been the case study, with six case studies serving to: (1) assist in the identification and understanding of the interplay of factors which influence the implementation and success of META, (2) provide a source of information for dissemination to other organisations using META through Evaluation Newsletters, assisting quality improvement, and (3) provide an information base for the preparation of questionnaires distributed to organisations using META.

Data gathering methods used in this evaluation included interviews with individuals and groups and questionnaires prepared for specific groups, namely: State

Coordinators, Chief Executives of organisations using META, advisers, a sample of team members in participant organisations, and organisations known to have purchased the META kit or to have attended a META launch. Other techniques included document analysis, invitations to respond to newsletters, and tele-conferencing with the Steering Committee. Distribution of questionnaires was managed through the State Coordinator-Advisers networks.

Constraints upon the evaluation (and affecting the findings) included the early stage of implementation for many organisations when case study and survey data were sought. The tight time-frame for the evaluation affected the amount of follow-up possible for late return of questionnaires.

Key findings and conclusions

The NSDC Pilot Implementation Program of META has allowed a range of experiences to be developed and evaluated. This has provided a rich body of material and experience.

META implementation

META implementation has varied between States and Territories, in terms of progress and local project evaluation. Commonwealth funding for META has varied considerably between the larger and smaller States and Territories, with consequent limitation to its potential development. There has been significant supplementary funding in some States, which has increased the level of take-up and support.

Launches of META have been well attended and have been a successful means of marketing. A high proportion of attendees at META launches have used META for a variety of purposes.

Factors for successful implementation

Key organisational factors for the successful implementation of META have been identified as:

- Support and proactive commitment by the chief executive and support from other executives
- The desire of the chief executive and senior management to move to (and implement) a team-based style of management
- Allocation of sufficient time for the adviser and the team(s) to move to (and implement) a team-based style of management
- Priority accorded META within the organisation–for example allocation of meeting times when most staff can be present

- Priority of the selected project as shown by the organisation, team and individual
- Selection of adviser with appropriate skills as identified in this evaluation
- Level of trust developed between team members
- *continued on next page*
- Motivation by the team members to adopt META
- The use of team-building activities
- Compatibility between the prevailing culture of the organisation and META principles.

The Adviser

The adviser is seen to be a key person in the successful implementation of META, with a range of desirable skills, experience and knowledge. Key requirements included:

- Skills and Experience in facilitation, group and interpersonal dynamics, communication approaches, training/learning methods, including competency based training.
- Knowledge of META, action learning/flexible delivery approaches, management theory/practices and one of social science, organisational behaviour or human resource management.
- Other requirements included interest in the META product and processes, credibility in the organisation and willingness to persist.

Adviser training is considered essential to the success of META, as reported by current advisers, and network meetings have been beneficial, providing support and networking.

Advisers report the need to spend time on managing META as a recognised part of their work. There has been considerable variation in the amount of time organisations have allocated to META advisers.

META Processes

Teams of Managers, Senior Management Teams, Current Work Teams and Special Project Teams are involved in META, with the first two being most common. Positive outcomes have been reported across the range of teams.

Most of the Best Practice Principles have been identified in current implementations of META. Principles not well developed relate to articulation with accredited education and training, equity and promotion of cultural diversity.

In many organisations, competency development has not, as yet, been a prominent component of META.

META benefits

Organisations have implemented META for many different reasons and potential benefits including:

- Culture change
- Team development
- Management development
- Strategic planning
- Purposefulness in problem solving and work processes
- Achieving outcomes
- Professional development
- Identifying and developing competencies
- Obtaining support
- Provision of funding
- Communication

Difficulties associated with the META model and materials have been identified and recommendations for modification have been made by those involved in the META program and detailed in the evaluation report. Some suggestions were:

- Include self assessment case studies/methods.
- Include more information on selection of team members.
- Provide options for getting started.
- Provide shells on disk/on-line.
- Update the competencies, and list of resources to enable participants to tailor their own.

META appears to have assisted organisations in cultural and organisational change.

The range of benefits identified by all groups associated with META is wide, suggesting that it has made significant contributions to participating organisations.

In view of the early stage of development of META in many institutions it is premature to be definitive concerning its cost effectiveness. It is considered to compare favourably with other management development programs.

META On-Line

The Internet has been a common means of communication between State Coordinators and advisers in only two States.

While many were looking forward to the introduction of META on-line, and expecting additional facilities, the level of access is uncertain. Back-up materials may be required for some time, especially for promotional purposes with people not familiar with on-line systems.

Recommendations

The recommendations in the following chart arise from the evaluation:

Recommendation	*Explanatory note*
That continuing funding and other resources be found to maintain and expand the adviser networks and to include people in remote locations.	Adviser networks were considered by advisers to contribute strongly to the effectiveness of META. There is evidence that implementation of META is not well advanced at this stage and it is expected that support will be needed.
That the information collated on the factors for successful use of META be published, perhaps as a 'readiness checklist' for organisations considering the use of META.	A high degree of consensus was found regarding some factors appearing to influence the successful implementation of META. A 'readiness checklist' would provide a convenient vehicle for preparing the organisation to commence META.
That guidance on team-building activities be included in the META materials.	Responses have indicated that team-building activities are considered important.
That information on the required adviser skills, knowledge, attitudes and support be published to assist organisations selecting advisers.	Considerable data was received indicating essential criteria for appointment of advisers.
That adviser training be reviewed in light of the findings on adviser skills and knowledge. It is possible reference could be made to relevant existing training programs in the META materials. It may be desirable to make supplementary training available to existing advisers.	Adviser training was considered essential, with some suggestions for modifications.
That the META materials be reviewed in light of comments on the materials and model.	The report contains useful contributions from State Coordinators, advisers and chief executives concerning possible modifications to the materials and META model.

That a program of ongoing marketing be recognised as important. State-based activities have been successful in the past and should be continued.	State launches of META have been effective in promoting awareness.
That additional material on competencies, selection of competencies and alternatives be included in the META materials.	Current META teams are using a variety of sources for competencies. Other teams have sought guidance on possible sources.
That written materials continue to be published to support META on-line. That in view of the plans for META on-line it would seem desirable that access to this facility be investigated and induction to the technology be provided where needed.	On-line technologies are not yet in widespread use.

1 META background

What META is:

The Management Enhancement Team Approach (META) is a product of the National Staff Development Committee (NSDC) within the Australian National Training Authority (ANTA). META has been designed to assist managers in vocational education and training to develop their management competencies and approach.

The product has been specially designed to address the needs of managers in the vocational education and training sector, and to use the language of the sector.

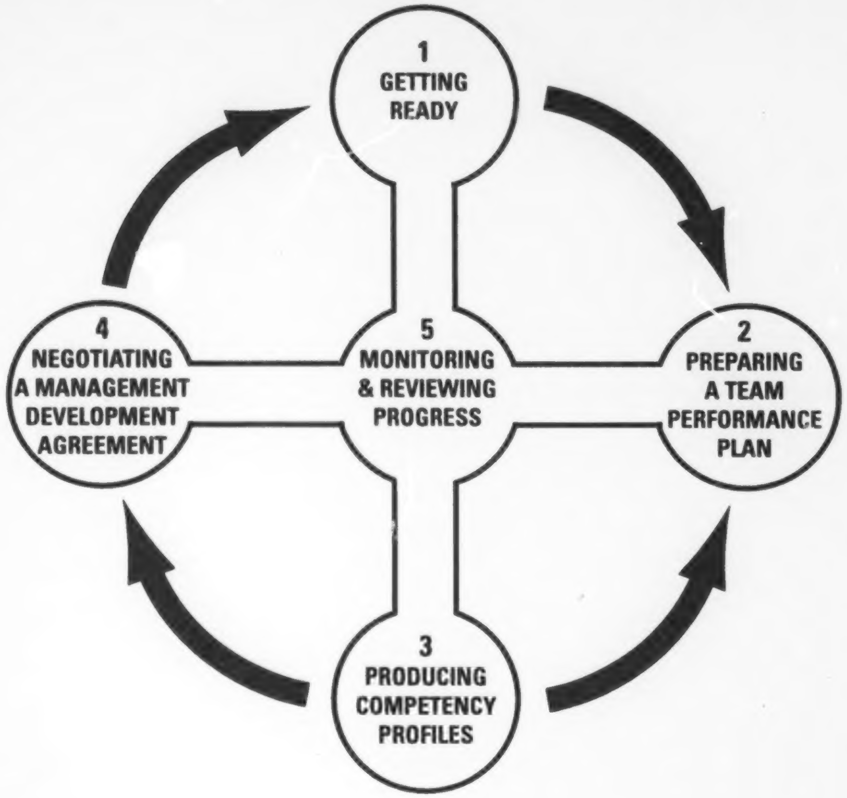
Aims of META

The kit identifies four fundamental outcomes that can be achieved by using the META system. These are:

- high performance management;
- best practice in management development;
- a culture of learning for continuous improvement within the enterprise; and
- strategic networks and partnerships within and between enterprises.

META is constructed around five process steps as described in the kit:

> The META system starts with the strategic and business plans of the enterprise. From these, Team Performance Plans are prepared which lead to the production of Competency Profiles for the team and individuals. From this base, Team and Individual Management Development Plans are prepared and a Team Management Development Agreement is negotiated. Monitoring and Reviewing progress is ongoing and planning and implementation are continuously improved. The five steps are illustrated in the following diagram.


1
GETTING
READY
2
PREPARING
A TEAM
PERFORMANCE
PLAN
3
PRODUCING
COMPETENCY
PROFILES
4
NEGOTIATING
A MANAGEMENT
DEVELOPMENT
AGREEMENT
5
MONITORING
& REVIEWING
PROGRESS

The kit also identifies what are considered to be the distinctive features of META

- It is designed in and for the vocational education and training sector.
- It is designed for use in vocational education and training enterprises and should be customised for each enterprise. It is not a 'one size fits all' system.
- It is Australian, tailored to the Australian business environment but taking account of the need for Australia's managers to understand local, national regional and global contexts.
- It is based on the need to develop both team and individual management competencies.
- It is consistent with the principles of best practice in management development outlines in the Industry Task Force on Leadership and Management Skills (Karpin Report).
- It facilitates improved performance outcomes for vocational education and training enterprises.

META is considered by the developers to address eight Best Practice principles identified in the research and development process that led to the creation of the META product. These are that management development:

- supports the strategic and business plans of the organisation;
- meets the needs of the organisation, the team and the individual;
- encourages diversity and flexibility in learning strategies;
- is competency-based;
- is team oriented;
- articulates with accredited education and training and recognises RPL;
- incorporates equity and promotes cultural diversity;
- is career-long.

These eight principles were originally articulated in the NSDC report titled *A Framework for Management Development in the NVETS.*

The META product

The product consists of four parts, each contained in a booklet, and appendices with supporting materials in a separate booklet. These five booklets have been packaged by the NSDC in a folder, along with a ready reference card describing the META outline and best practice management development principles. This pack is described as a 'do-it-yourself' kit in promotional materials produced by the NSDC.

The four parts of the META Kit are:

Part 1	Why META? (Introduction)
Part 2	Guide to Implementation
Part 3	Implementation Shells
Part 4	Management Competencies for Vocational Education and Training

In addition, the Victorian Office of Technical and Further Education (OTFE) in conjunction with the NSDC produced an edited reprint of the Introductory Section of the META Kit which summarises the key features of the META system contained in the product. This reprint is designed to provide additional information for potential purchasers and users of the META product with more detailed information on which to base a decision to purchase or use the product.

National Management Development Scheme

In 1994 the NSDC implemented a program called the National Management Development Scheme. One early outcome of this program was the report of the NSDC titled, *A Framework for Management Development in the NVETS.*

Included in the National Management Development Scheme program were activities which:

- involved the development of management competencies through workshops, trialing and validation;
- identified, workshopped, trialed and documented team development planning information;
- established and managed a Best Practice Network;
- cooperated with selected organisations to document case studies;
- prepared learning outcomes/resources and manuals;
- prepared and distributed bulletins; and
- evaluated and reported on activities.

This program was expected to implement a major national Management Development program across the NVETS (now VET) which:

- established a best practice approach to Management Development in VET;
- established a Management Development Network across the VET sector;
- promoted team development linked to strategic planning in VET organisations;
- validated management competencies; and
- trialed a specific management development model for the VET sector.

The META product is one of the outcomes of this program in that it incorporates:

1 management team development linked to strategic planning.
2 management competencies for both a team and individuals in the team.
3 a specific management development model for VET organisations.

In addition, META documents the best practice principles identified in the original report and incorporated within the Scheme.

Since the program was initiated, there have been other activities to improve management practice and development in Australia. The findings of the *Report of the Industry Task Force in Leadership and Management Skills* in 1995, commonly referred to as the *Enterprising Nation* or *Karpin Report* in many ways parallel the aims of the National Management Development Scheme.

The evaluators have been advised that the Project Manager and consultants took due note of the Task Force findings as they were published although many of the National Management Development Scheme activities had already been implemented.

In addition, there have been management competencies developed for Small Business, for Frontline Managers (as promoted by the Karpin Report) and for Adult and Community Education. All of these have been referred to by members of the META development team during interviews and discussions with the evaluators.

The scope of this evaluation is confined to the META product and its pilot implementation. The National Management Development Scheme included activities which led to the development of META.

Development of META

The development work that produced META was built around the eight principles first expressed in the *A Framework for Management Development in the NVETS* report. The NSDC and the developers saw these principles as the basis for the project work.

The META product is the result of a staged action learning process, involving particular action learning groups and other reference groups. There were eight Case Study Groups, one in each of the States and Territories, Focus Groups from the Adult and Community Education sector in three States, and Expert Panels meeting in two States. The project was overseen by a Reference Committee (see the META Appendices for more detail).

In addition to the above, the consulting team also made a number of site visits to observe activities and interview participants where there was evidence of Best Practice. Reports on these Best Practice sites are included in the META Appendices.

META in a draft form was trialed in the case study sites as part of a product improvement and development cycle.

Marketing of META product

Marketing of the META product was seen as a component of the overall project which developed META, the National Management Development Scheme. Funding of marketing activities included:

- Product launches.
- Training of advisers, whose role was to facilitate groups through the META program.
- Ongoing support for advisers through networking.
- Printing and distribution of promotional information.
- Funds for implementing META in VET provider organisations.

The META product was launched nationally by the NSDC and there were subsequent launches in each State and Territory managed by the local State/Territory NSDC coordinator. People invited to these product launches included:

- vocational authority staff, especially those involved in professional development;
- chief executives and professional development staff in TAFE Institutes; and
- representatives from private training providers.

Each NSDC State/Territory representative was provided, as part of the launch, with a number of kits which were sold at discount or provided free of charge to people who wished to examine the product further. The NSDC also sold some kits in bulk orders. In addition, the products are being sold through ACTRAC Products Pty Ltd, the Australian Government Publishing Service and Commonwealth Government Bookshops.

The product has been promoted in some States by the State/Territory NSDC representatives and others familiar with the product through:

- Presentations to chief executives.
- Presentations within a VET organisation to groups of managers.

In addition, there have been advertisements promoting META in ANTA and ACTRAC Products publications.

A major marketing component for META has been the funding of 'pilots' to implement META in VET organisations. The philosophy behind this has been to have sufficient live examples of META operating for a 'critical mass' to be formed, that in itself promotes the product and process into other organisations.

META is not promoted as a training program, curriculum or a set of traditional learning materials. It is seen as a framework for management development, providing a set of processes and implementation 'shells' to be selected and customised by the team adviser to suit the particular team and application of META.

The pilot funding for META sites

Funding for the implementation of pilots was provided by NSDC to the States/Territories through the mechanism of funding agreements. Several of the States and Territories have added to this funding to provide for more pilots in different sites. In the larger States, applications for funding were sought from VET organisations, and the successful sites selected against predetermined criteria. In New South Wales and Victoria, there have been multiple calls for expression of interest and funding rounds.

In Tasmania and the Territories, the funds have been provided to organisations without a call for expressions of interest, due to the limited number of eligible VET organisations.

The concept has been to provide $10 000 funding to each pilot, to assist in implementation. It was not intended to cover the full costs of the META group.

In return, the pilot groups were required to report back to the State authority on achievements, and to participate in evaluation(s) of META. The reporting process varied in each State and Territory.

At the time the evaluators commenced their work, there were 63 funded pilots in all States and Territories. Since that time the number of funded pilots has grown, due to recent funding rounds in the larger States. The original list provided to the consultants was:

New South Wales	12 pilots
Victoria	26
South Australia	5
Western Australia	9
Tasmania	2
Queensland	7
Northern Territory	1
ACT	1

To support the pilots other arrangements were put in place:

- Training for the people who were to act as 'advisers', i.e. facilitators of the META groups. At the time this evaluation commenced it was recorded that 117 advisers from 75 organisations had been to the two days of training.
- In each State and Territory a network of advisers was to be established and facilitated by the State/Territory NSDC coordinator, except in NT, where networking with the South Australian group was arranged.
- The developers were available to provide additional support.

Adviser training has continued in some States through to early 1997. There has been some follow up training provided and additional training suggested.

The support given to the organisations implementing META and to the advisers, together with the kit, has been described as the META Scheme. The evaluation includes analysis of the META Scheme.

2 Purposes of the evaluation

Aim and purposes of the evaluation

The aim of the Evaluation project is:

> to gauge the success of the pilot implementation phase of the scheme to date, in order to inform product improvement, future policy development, future resourcing decisions and contribute to a continuous improvement cycle.

The purposes of the Evaluation are specifically to:

- monitor META implementation;
- ensure that resources are being spent in a cost effective manner to achieve identified outcomes;
- gauge client satisfaction;
- clearly identify the specific benefits likely to accrue from using META;
- assist with product improvement; and
- inform future policy development.

Focussing questions

The following are the key focussing questions which provide the framework for the evaluation:

1 What are the present levels of participation/non participation in the META program?

2 What has been the extent of other sales/users of META outside the trials?

3 What is the nature of the adviser role and of the training and support provided?

4 How cost effective is META?

5 What is the level of user satisfaction associated with META?

6 (a) What evidence is there of transferability of META to other professional development strategies?

(b) What is the evidence of the Best Practice Principles in META implementation?

7 How effectively has the META scheme operated? What are the strengths and weaknesses of the model?

8 How has META been implemented in specific case study sites, and to what effect?

3 Methodology

Underlying assumptions

A set of assumptions underlies the present evaluation of the META product/tool and system. These are:

- There is a range of stakeholders with an interest in the planning, development, implementation and evaluation of META, including:
- the Evaluation Steering Committee,
- the National Staff Development Committee,
- the Australian National Training Authority,
- State/Territory Training Authorities,
- institutions affected by the use of META,
- those responsible for the ongoing development of the product and induction processes as well as advisers and other participants.
- The META product is used both within the funded scheme and to varying degrees outside it, both modes to be taken into account in the evaluation.
- There are eight best practice management development principles which represent a set of values providing the framework of META as a professional development strategy, namely:
- supporting the strategic and business plans of an organisation;
- meeting the needs of the organisation, the team and the individual;
- competency based;
- team oriented;
- encouraging diversity and flexibility in learning strategies;
- articulation with accredited education and training programs and recognising prior learning;
- incorporating equity and promoting cultural diversity; and
- career long.

The incorporation of these principles is of interest in the evaluation.

- In keeping with the developmental nature of the program, the evaluation is to be formative, involving ongoing feedback to stakeholders and organisations. This process will facilitate program improvement through regular dissemination of information.
- The evaluation will be responsive to emergent issues, in consultation with the Steering Committee.
- The evaluation is to involve the collection of both quantitative and qualitative data, with case study sites being a major source of qualitative data. The collection of quantitative data, which will be drawn from a wider range of stakeholders, will involve close liaison with the relevant State/Territory contact officers who State/Territory Training Authorities have agreed will assist in data collection.

Evaluation perspective

A view of evaluation suited to the rationale of the META program is that promoted by the evaluator, Barry MacDonald, Centre for Applied Research and Evaluation, University of East Anglia:

> Evaluation is the process of conceiving, obtaining and communicating useful information for the guidance of educational decision making with regard to a specified project or context. Evaluation is a service to those who have a need to understand and make judgements about the appropriateness or value of an educational project.

The evaluation is formative, providing feedback to key stakeholders (including participants) throughout and enabling ongoing improvement through the provision of information and the sharing of examples of best practice. Regular reporting has taken place with the Steering Committee and Evaluation Newsletters have been distributed to State Coordinators, Chief Executives, advisers and participants in META. Meetings with groups of advisers in South Australia and Victoria have provided further opportunities for disseminating evaluation findings as well as receiving information relating to participants' experiences.

A responsive approach has been taken in the evaluation, allowing consideration of any issues raised in preliminary discussions with key stakeholders or emerging during the evaluation. Steering Committee endorsement has been sought for any variations to the evaluation plan.

Case studies

A major component of this evaluation is the case study. Six case studies of organisations using META were proposed in the evaluation brief, namely:

- Barton Institute of TAFE (Melbourne)
- Central West Community College (Bathurst)
- Douglas Mawson Institute of TAFE (Adelaide)
- Hobart Institute of TAFE
- Regional Training Services (Albany, WA)
- Burswood Casino (Perth).

The case studies play a central role in this evaluation. They serve to:

- assist in the identification and understanding of the interplay of factors which influence the implementation and success of META;
- provide a source of information for dissemination to other organisations using META through the Evaluation Newsletters, assisting quality improvement; and
- inform the preparation of questionnaires distributed to other sites using META.

Each case study organisation was visited by an evaluator. Interviews were conducted with the Director of the organisation, the adviser, groups of team members and individual participants. Prior to the visit a case study proforma was provided to the organisation to assist preparation for the site visit. Following the site visits the evaluator completed a case study summary and an extended statement which were forwarded to the organisation for comment.

Data gathering

The data gathering methods used in this evaluation included:

1 Interviews

Interviews were conducted with a range of stakeholders, including people involved in the design, coordination, and implementation of the program nationally. Some State Coordinators have been interviewed in a face to face situation, while telephone discussions and written correspondence has occurred with others. As indicated, during case study visits individual and group interviews were conducted. In the case of face-to-face interviews a large proportion of these were recorded and subsequently transcribed.

In the Regional Training Services Case Study, because of the widespread distribution of team members, a number of additional interviews were conducted by telephone.

2 Questionnaires

Questionnaires were distributed to State Coordinators, Directors of organisations using META, META advisers, a sample of participants in each funded organisation using META and questionnaires were also forwarded to a sample of organisations which were known to have purchased the META Kit or had attended the META launch. Copies of the questionnaires appear in the Appendix.

3 Document Analysis

Documents relating to the national development of META were drawn upon, as were individual documents from the case study organisations. An additional source of information was that of evaluation reports prepared by individual organisations to meet requirements of some States.

4 Responses to Newsletters

Participants in META received Evaluation Newsletters to which they were invited to respond. Such responses were another potential source of data.

5 Teleconferencing

The teleconference was used in interaction with the Steering Committee in addition to other means.

Sampling

Questionnaires concerning META were forwarded to all State Coordinators as well as to all Directors and advisers of funded organisations, using the State META adviser network (through State Coordinators). Advisers from funded organisations were requested to distribute questionnaires to a random sample of eight participants in their organisation. Provision was made for the completed forms to remain anonymous. The findings from the questionnaires are to be considered suggestive only, because the time schedule has allowed limited follow-up of late responses.

Phases in the evaluation

The evaluation comprised the following phases:

Phase 1 Project establishment and preliminary collection

1.1 Initial consultation and review of evaluation plans with Steering Committee representative

1.2 Examination of current documentation relating to the META Scheme

1.3 Identification of key program stakeholders, followed by consultations

Phase 2 Consultations with workplace representatives

The consultations described below provided guidance in the drawing up of case study interview schedules and questionnaires distributed to key stakeholders later in the study:

2.1 Initial contact with case study sites (arranged through the relevant State/Territory contact officer). Background and contextual information, along with current perceptions.

2.2 Interviews with key informants, such as the Steering Committee, META Developers and State/Territory Coordinators.

2.3 Meeting with South Australian Coordinator and advisers–overview of progress.

2.4 Distribution of the first Evaluator META Newsletter to participants of META. This newsletter served to introduce the evaluators, outline the purposes of the evaluation and to invite participation in the feedback and evaluation process.

Phase 3 Case study visits and state meetings

3.1 Each of the six case study sites was visited. Group interviews were conducted with up to 15 staff from the organisation related to the META program or affected by it. Individual interviews were conducted with key people, including the Chief Executive of the organisation, the adviser and a sample of team members.

3.2 Structured group interviews were also held with advisers in Melbourne and Adelaide. These interviews covered experiences and perceptions of the META Program.

3.3 Distribution of a second Evaluator META Newsletter to participants of META. This newsletter included summaries of three case studies, providing opportunities for participants of other projects to consider the issues raised, in relation to their experiences of META.

3.4 A teleconference was conducted with the Steering Committee, providing feedback from the evaluation and progress report.

Phase 4 Survey design, review, trialing and application

4.1 Preparation, piloting, review and distribution of questionnaires. Separate questionnaires were distributed to:

- State Coordinators
- Chief Executives of organisations using META
- Advisers
- Team Members

4.2 Preparation, trialing and distribution of questionnaire to a convenience sample of organisations using META without induction training.

Phase 5 Processing data and reporting

5.1 Processing of questionnaire data

5.2 Distribution of a third Evaluator META Newsletter to participants of META. This newsletter included summaries of the further three case studies and extracted findings from completed surveys.

Phase 6 Preparation and presentation of report

6.1 Preparation of draft final report

6.2 Discussion with Steering Committee

6.3 Submission of final report

Constraints

There are several constraints upon the evaluation which should be noted. The case studies which were undertaken were nominated in the evaluation brief rather than selected by the evaluators. Although the case studies provided a spread of organisations, both geographically and in their functions, it was found that some had not progressed as far as anticipated by the time of the evaluator's visit. The design of the evaluation required case study visits to be undertaken early in the process in order to provide information for immediate dissemination to other sites and also to inform the survey questions. This placed a limit on the range of experiences that could be reported.

The evaluation budget allowed for two meetings with groups of State advisers (South Australia and Victoria); however, all advisers were invited to respond to a survey which included open-ended questions.

The necessity to complete the evaluation within a tight time-frame has meant that follow-up of non-respondents to questionnaires has been limited and that a processing deadline had to be imposed on the receipt of questionnaires. Financial constraints influenced the mode of distribution and return of questionnaires, use being made of the existing State Coordinator and adviser network.

The rate of return of questionnaires was lower than had been anticipated. It appears this was influenced by the fact that many organisations considered that they had not progressed sufficiently through META to make a valid response. Some telephone calls were received requesting exemption from the survey due to lack of progress. These people were asked to respond to at least the advisers' questionnaire.

Other examples of reluctance to answer questionnaires were included in the responses: 'Our chief executive did not want to make comment since META has not been used in our Institute enough to make worthwhile evaluations. For the same reason I did not distribute the participant questionnaires.' Another respondent qualified his/her comments with the statement: ' (It) needs to be recognised that my comments are in the light of the fact that we are still in the early stages of the process, and may not have much validity.' In the course of answering the questionnaire, there are numerous occasions where the respondent chose not to make an entry, as indicated in the tables within the report.

Presentation of report

The report format follows the framework provided by the key questions identified by those who commissioned the evaluation. Additional topics have been included for contextual reasons and/or to further understanding of META and its implementation. Because the feedback of participants is seen to be of considerable usefulness to those responsible for making ongoing modifications to META and introducing META on-line, this has been incorporated within the report to a greater degree than otherwise may be the case. As there are distinct groups whose perceptions are important (State Coordinators, advisers, Chief Executives of organisations and team members) and need to be presented, there is a degree of overlap and repetition of topics covered.

As indicated, case studies have provided the basis for newsletter summaries and have served to generate the survey instruments used to gather data in the evaluation. In view of the early stage of development of META in some of the case-study sites and contextual variations between sites, it has been considered appropriate to use different formats in reporting. The case studies appear as a separate Appendix.

4 Findings

This section of the report addresses the focussing questions of the evaluation, drawing upon data collected through the questionnaires, meetings with groups of advisers, information provided by State/Territory Coordinators and NSDC and qualitative information from the case studies. In addition, there are sub-sections relating to issues that emerged during the evaluation.

What are the present levels of participation and non-participation in the META program?

4.1 Participation in META

The marketing of META attracted a considerable number of people to State launches and to consider seeking funding. Statistics on the launches, applications for funding and training of advisers are shown in Table 1.

Table 1 Level of interest in META

Level of interest	*NSW*	*VIC*	*QLD*	*SA*	*WA*	*TAS*	*NT*	*ACT*
No. of participants at the State launches	about 90	about 120	about 60	about 60	67	55	about 34	n/a
No. of expressions of interest in site funding	about 17	44 with 34 applications	about 15	10	18	4	3 for advisers	1 grant
No. of sites receiving funding	13	29	9	5	9	2	1	1
No. of expressions of interest in META adviser training (appears all who applied were trained)	about 23	about 43	about 16	23	18	19	3	13

People attending a launch were drawn from the following types of occupations and organisations:

- TAFE Directors
- Private providers
- Consultants
- Skillshares
- Neighbourhood houses
- Training departments of large organisations
- VET administrators
- Schools involved in VET
- Industry Training companies
- Group Training Schemes
- TAFE Executive Management
- Managers of TAFE divisions
- Human Resource Managers
- Community Colleges
- Best Practice Network
- Industry Training Advisory bodies
- Universities
- Aboriginal Development Unit
- Government departments

4.2 Nature of sites receiving funding

The list of organisations having staff trained as advisers to May 1996 appears as Table 2. (from Project Brief, Attachment 1). Further training courses have been conducted in several States, with a similar mix of organisations. The types of organisations receiving funding varied little from this, as shown in Table 3.

Table 2 META adviser training to May 1996

Organisation	*No. of staff trained as advisers*	*No. of organisations represented*
TAFE Institutes	58	38
Adult and Community Education Providers	5	3
Adult and Community Education –State Office	1	1
Private Training Providers/Skillshare	5	3
Private Training Providers/Other	17	14
University	2	2
State Training Agencies	20	6
Other Government Departments/Agencies	6	6
Industry Training Council	2	1
Chamber of Commerce and Industry	1	1
TOTALS	117	75

The group 'Private Training Providers/Other' includes organisations who have a primary purpose other than training, e.g. casino.

Table 3 Nature of sites receiving funding

TAFE Institutes (including TAFE Division of University)
Adult and Community Education Providers & Council
Private Training Providers e.g. Group Training, Skillshare, Private Training Organisations & Businesses
Industry Training Council
Technology Centre
Neighbourhood House

In addition, other types of organisations joined adviser networks and/or implemented META, for example, government departments (other than VET organisations) and State Training Agencies.

Funding

All organisations responding to the survey were asked to identify the funding sources for their META implementation. The main sources identified were the pilot funding provided through the State/Territory Training Authorities, which was NSDC funds supplemented in some cases by Training Authority funds, and internal sources of funding. A number of sites indicated that this internal funding was a budgeted human resource development item.

Current involvement in META

In discussions with State/Territory META Coordinators, it became apparent that these people had considerable knowledge about the META implementation and a questionnaire was subsequently distributed to them. All coordinators completed the questionnaire, a copy of which is attached as Appendix E.

Some of the coordinators have been involved with META through its development process, while others have taken over this position recently. The extent of information provided is related to the length of this involvement, but the overall information has provided valuable input to the evaluation.

The coordinators were asked about their knowledge of the use of META. This information is listed in Table 4

Table 4 Involvement in META projects

	State/Territory								
Question	*WA*	*SA*	*VIC*	*ACT*	*NT*	*QLD*	*TAS*	*NSW*	*Total*
No. of active META advisers	11	12	43	3	2	11	3	19	104
No. of organisations using META, in coordinators' knowledge	9	8	29	0	1	9	3	13	72
No. of these organisations receiving META grant funding	9	5	29	0	1	7	2	13	66
No. of individual META teams	9	8	40	3	1	6	7	15	88
No. of META projects terminated before the expected time	2	1	0	0	0	0	0	3	6

Informal information suggests that there are other organisations using META as well. This information has come from:

- Comments and telephone calls received during the evaluation on who is using META.
- Responses from organisations that have expressed interest in META.
- Sales of the META Kit through ACTRAC Products Pty Ltd.

Some information was obtained from these organisations through the questionnaires. (see Section 4.7 below).

4.3 Expected benefits from META when applying for funding

Advisers indicated that when they applied for funding they expected META to offer specific benefits. The complete list of benefits is produced as Appendix B. The types of benefits sought relate to:

- Culture Change
- Team Development
- Management Development
- Strategic Planning
- Purposefulness in Problem Solving and Work Processes
- Achieving Outcomes
- Professional Development
- Identifying and Developing Competencies
- Obtaining Support
- Provision of Funding
- Communication

4.4 Organisations expressing interest in META

Two ways in which organisations have been associated with META and then not proceeded are:

1. Reviewed META through the purchase of a META Kit or through attending one of the launches and then not continued.
2. Commenced use of META with a team in their organisation and then discontinued its use.

Information on both types of involvement has been obtained.

4.4.1 Initial expressions of interest

Through recorded sales of the META Kit it was possible to send a brief survey to those who had made the purchase. State Coordinators were also asked to forward the questionnaire to people who had attended a launch of META in their State or Territory. From the 54 questionnaires returned it is possible to gain some impression of wider reactions to META.

It was found that 37 per cent of the 54 organisations responding had used META or META materials in their organisations. Of those who had not used META, 62 per cent said that it was likely that they would in the future, with 18 per cent undecided.

The organisations which had used META had used it for such purposes as:

- development of skills and processes, team development and performance management techniques;
- HRM policy management and review;
- to assist member organisations;
- background reading and ideas which relate to team approach work...undertaking;
- resource material for other projects;
- an addition to other processes being used;
- trial basis to evaluate;
- a META Project...;
- a framework for regional planning and competency development;
- to develop middle management;
- in-house processes aligned against META–dentifying similarities with their own training packages;
- implementation of META with College Corporate Executive;
- application to management team in some areas i.e. identification of skill requirements to meet changing program needs;
- part of a consultancy to a TAFE Institute; and
- trialing META with a committee structure.

Future use of META

The organisations which stated that they intend to use META in the future indicated a range of ways in which they see it likely to be of benefit to them. There appears to be an interest in hearing more about META and how it can be implemented, as indicated by the comments:

> I am surprised that no information has been received since the product launch –was there an implementation/dissemination plan?

> META seems an appropriate approach to the conduct of Community Based Organisations. But we need further information about how the processes work. Newsletter No. 2 suggests promising results can be achieved. Please send details to me ...

The responses from those who expressed uncertainty as to whether they will use META in the future referred to there having been insufficient opportunity to assess the kit up to the present. One comment referred to the material being too focussed on TAFE, when the principles were also appropriate to industry—it was not sufficiently generic in its present form.

The few responses indicating no intention to use META did not provide reasons, apart from the following:

> (We did not use it because) we were heading along these lines already.
>
> The organisation will be changing very shortly and may be subsumed by another with its own ethos.
>
> (META) not relevant. I tried to implement it, but it was too difficult, not enough commitment from management/resistance from colleagues. (Concerning the future) not committed, branch undergoing major restructure, ... low staff morale. Lack of time for staff to be involved. ...
>
> Not seen as necessary, given other initiatives. ... Program appears quite good but not aligned to direction we want to pursue.

The State/Territory Coordinators collated reasons that organisations had given for not taking up META. The reasons given were:

> META did not fit the small enterprises. It was deemed expensive.
>
> Already involved in team development strategy.
>
> Preference to use capability versus competency profiles.
>
> Senior management teams chose to use different performance measures.
>
> Requires seed funding.
>
> Adviser training did not appear to provide sufficient skills to implement META.
>
> No time. Too many other things happening (another comment referred to pressure of time).
>
> Have not fully understood the benefits of the process and how it can enhance their business processes and Belief that it is not needed.
>
> Teams not mature enough and Not a team culture.

It is to be expected that META, like all management development programs and training programs, will not suit all cultures or to be attractive to all organisations. The META developers have expected that META would not appeal to some organisations, due to the wide diversity of organisational cultures in Australia.

This is especially true where the organisation does not have a team culture, or where there are forces hindering a team culture. META is designed for a group of people operating as a team.

There is still some debate in parts of the VET sector over the use of competency-based training concepts. The developers believe META can be used with alternative measures of individual and team skills with which the team feels comfortable.

The VET sector in 1996 and 1997 consists of a number of large providers, mainly TAFE and non-profit, with a number of smaller providers, mainly private organisations. In the evaluation, most responding organisations were TAFE and non-profit providers.

The smaller organisations are often recent entrants to the VET sector as a result of the development of the national training market. There are cases where VET organisations with five or more senior staff are implementing META successfully.

4.4.2 Projects not reaching completion

Six of the funded META organisations have been identified by the State Coordinators as being terminated (see Table 4). The reasons given for this are:

> Chosen to use alternative management or team development approaches.
>
> Adviser inexperienced in supporting group—needed understanding of facilitation of groups and team teaming facilitation.
>
> The groups terminated say they will pick up again.
>
> The team members stopped at competency assessment stage because of 'too much process.'

These comments point to key findings that have been found in the case studies, interviews with groups and advisers and the questionnaires, namely:

- The advisers need to have a set of facilitation and group-work skills prior to their training as META advisers.
- Some groups are using a wide mix of methods to develop their skills and teamwork.
- A number of teams have difficulty at the stage of applying competencies.

4.5 Nature of META teams

META is presented as being suitable for a wide range of teams in the VET sector. In terms of its application it is important to identify:

- The types of teams using META.
- The way in which participants were involved.

- Whether the teams were existing groups or specially formed groups.
- Progress in the five stages of META at the time of the survey.

The chief executives defined their teams as in table 5 and commented on the application of META to different types of teams.

Table 5 Use and appropriateness of META to different teams

Note: In all, 32 responses were received, with variations in completeness of individual responses.

Type of team		*In your organisation*	*Suitability of META for this type of team?*		
			Suitable	*Unsuitable*	*Unsure*
1	Senior Management Team	19	17	1	5
2	Team of Managers	20	22		1
3	Current Work Unit	7	12		
4	Special Project Team	9	11		
5	Other (Teaching Departments)	1			

It can be seen that the majority of pilots were with Managers or Senior Management. While some Chief Executives have expressed uncertainty in relation to Senior Management teams, they have no doubt about its use with other types of teams.

Comments on the application to various types of teams included:

> We are currently implementing Team Planning into the Institute. In twelve months 50-60% of The Institute has team plans. Currently reviewing and developing next phase.
>
> [there is] a greater commitment to team ethic and performance [in current work unit and Special Project Teams].
>
> Our organisation is relatively small. Therefore the team involved representation from all staffing levels.
>
> Senior team project only just commencing.
>
> I would like to see it used for Frontline Managers in conjunction with the FMI competencies.
>
> Teams made up of managers proved suitable for the task. Other teams appear to be struggling.

Profile of Teams

META advisers profiled their teams in terms of the type of team, range of management levels and total meeting hours as follows:

Table 6 Type and scope of team (numbers of teams reported)

No. of people in team	*Type of team*				
	Senior management	*Team of managers*	*Current work unit*	*Special project team*	*Other*
Less than 5	7	5	5	2	
From 6 to 10	4	8	17	2	1
From 11 to 15	4	4	8		1
From 16 to 20		1	2		1
More than 20 people		1	2		

Note: Some of the larger teams broke into sub-teams for some activities.

In relation to the largest team in the organisation, advisers were asked to indicate the extent of voluntary membership and the composition of the team. The statistics indicate that most teams were pre-existing and that the members were required to participate (see Table 7).

Table 7 Team formation (n=40)

Method of Formation	*Responses (%)*
Entirely volunteers	25
Largely volunteers	20
Required to participate	50
Other	5

A specially formed group	22.5
An existing group	72.5
No entry	5

Use of META Kit

The META Kit and system has been used in the sites in a variety of ways, as shown by the following tables:

Table 8 Use of META Kits with participants

Note: Many advisers took more than one action, so the total of responses is greater than 40

Action taken on META Kits	*Responses (no. of advisers)*
META Kits distributed to staff	13
META Kits accessible to staff as loan copies for those interested	22
Photocopied sections/instruments distributed as appropriate	33
META materials available to team	25
Modified material produced and distributed to team	24
Incorporated META into overall professional development plan	15
Other	1

Progress of teams

Table 9 Teams completing META steps (n=40)

		Responses (%)					
Step	*Description*	*did not occur*	*too little time*	*about right time*	*too much time*	*no of teams completing step*	*variations in n*
1	Getting Ready	0	23	69	8	39	n=39
2	Preparing a Team Performance Plan	8	16	65	11	34	n=37
3.1	Producing Team Competency Profiles	28	31	22	19	23	n=32
3.2	Producing Individual Competency Profiles	39	29	19	13	19	n=31
4.1	Negotiating a Management Development Agreement	41	24	35	0	17	n=29
4.2	Signing a Formal Agreement	62	10	28	0	11	n=29
5	Monitoring and Reviewing Progress	20	56	24	0	20	n=25

Another important factor in considering the survey results was the progress many teams had made through the META process at the time of data collection for this evaluation (late February, 1997). The case studies had indicated that the progress was likely to be slower than anticipated. The advisers' returns, as shown in Table 9 above, indicate less than half of the responding sites had progressed to steps 4 and 5 in the META process.

4.6 Variations in implementation processes

The agreements between the NSDC and the States and Territories were designed to ensure META was implemented across Australia in a reasonably consistent manner. The allocation of NSDC funds of $368 000 is shown in Table 10.

Table 10 Allocation of funds for META implementation and number of funded sites

State/Territory	*Funded sites*	*Funding*	*State/Territory*	*Funded sites*	*Funding*
New South Wales	13	$ 113 750	South Australia	5	$ 33 600
Victoria	29	$ 87 500	Tasmania	2	$ 16 800
Queensland	9	$ 57 750	Australian Capital Territory	1	$ 10 500
Western Australia	9	$ 39 900	Northern Territory	3 advisers	$ 8 400

A number of States added to this amount to ensure a sufficient number of pilot sites were funded at the proposed amount of $10 000. For example, in Victoria the additional amount was approximately $200 000 and in Western Australia approximately $50 000. The funding provided to Tasmania and the Territories was only sufficient for a very limited number of pilot sites.

Differences noted between jurisdictions

- In the larger States, there were sufficient sites to develop strong adviser networks and exchange of experience. These networks were not as strong in the smaller jurisdictions.
- In NSW and Victoria, the multiple rounds of funding allowed for the marketing of META to be built up over a longer time.
- In some jurisdictions, more time was allocated in the Training Authority for the coordinator to market META and to support the pilot implementations.

- The contracts signed with the organisations conducting pilots had varying requirements for outcomes, for example, in Victoria, a condition of the agreement was the team preparation of a Management Development Agreement, while more general and varied reporting arrangements were required by other States.
- The local evaluation processes as reported by State/Territory Coordinators vary between the States and Territories:
    - Documentation of meetings and tele-conferences—key issues raised.
    - Local pilot site evaluation to be completed as a condition of the Funding Grant Agreement.
    - Report from each funded pilot with required headings. Feedback at meetings, and collection and printing of 'case studies.'
    - Funded pilots to provide a summary report and a training satisfaction survey used.
    - No evaluation planned.
    - Evaluation workshop with advisers.
    - Informal, through adviser network.

  In some States there are contract and financial reasons for the pilots to complete the META process in time for their local evaluations, and in other States there are no requirements to complete the META process within a timeframe.

It is probable that these variations have had some influence on META implementation in:

- The effort made by pilot sites to progress through the META steps.
- The speed at which teams progress.
- Identification of issues relating to, and benefits of, META

What has been the extent of other sales/users of META outside the trials?

4.7 Use of META Outside Funded Scheme

The information in Table 4, in Section 4.2 and in Section 4.4.1 above indicate that there are a number of organisations outside the funded sites using META. In addition, informal contact was made with several organisations who were using META without external funding.

The types of organisations who responded to this questionnaire included:

- Private training providers
- Private businesses
- Government departments
- TAFE Institutes

These organisations recorded that they learned about META from the following sources (Table 11):

Table 11 Promotional contacts with META product

Type of contact	*No of responses*
From professional contacts	17
Newsletters	19
Invitations to apply for funding	10
At the META Launch	20
Other	6

From the comments made in the questionnaires, (where 62 per cent of the organisations which had earlier expressed interest in META, had stated that they are likely to use META in the future,) and from other comments of chief executives that they are likely to continue using META, there appears to be ongoing demand for the program. It would appear that this demand is likely to come from the increasing number of private training providers, where current take-up of META appears low, and from other organisations, such as government departments and neighbourhood houses.

In the evaluation, no differences in levels of satisfaction with META between funded and unfunded sites has been apparent.

What is the nature of the adviser role and of the training and support provided?

4.8 Adviser training and support

Support for advisers was provided as part of the introduction of the META scheme. This support was generally available for funded and unfunded sites. The support consisted mainly of three components:

1 Information from coordinators

2 Adviser training

3 Adviser network meetings

In addition, both the State/Territory Coordinators and the META developers provided one-on-one advice and support. This section reviews information on the adviser support.

4.8.1 Communication with META Advisers

Communication with and networking between advisers is considered by the developers to be important and funding to support this has been included in the META Scheme. The coordinators were asked about their experience, which is summarised in Table 12.

Table 12 Communication with META Advisers

The following table lists answers to the questions: 'What forms of communication have you had with META advisers?' and 'What was the most effective form?'

Type of communication	***State/Territory***							
	WA	*SA*	*VIC*	*ACT*	*NT*	*QLD*	*TAS*	*NSW*
Telephone	–	–	–	–		–	–	–
Letter	–	–	–	–	–	–	–	–
Internet	–							–
Network face-face-meetings	–	–	–			–	–	–
Teleconference	–					–		–
Other: (disk server, Newsgroup)								–
Most effective	face-to-face	face-to-face	face-to-face	both methods		face-to-face	face-to-face	face-to face

The network meetings are regarded as the most effective form of communication with advisers. The evaluation consultants attended three of these meetings and noted a high level of communication and sharing between the advisers. It would appear that continuation of these meetings is an important adjunct to the future use of META.

4.8.2 Adviser training

The META developers planned adviser training based on experience of their case studies of Best Practice. They prepared a two-day training program, which assumed the advisers had previously acquired the necessary facilitation skills and knowledge of team processes. The training program developers aimed to provide the advisers with exposure to META, its principles and processes and guidelines for use. They considered this would equip the advisers with the knowledge and skills to commence the META process.

Most of the training for advisers has been the two-day program prepared by the META developers. There have been two one-day programs and two half-day briefings for individuals in Victoria. South Australia has conducted local workshops. In Western Australia, a half-day of additional training to the two-day program was arranged as part of a network meeting.

The coordinators have made a number of suggestions to change the training in future, including:

1. Consideration of different formats and timing of the training such as providing the training in stages, or after the adviser had commenced the META process, or a main training session followed by shorter sessions in an action learning style.
2. Providing more depth or expanding the scope of the training to include:
   - getting short presentations from current advisers;
   - extending the training to three days, and including more examination of the 'shells' and the competencies;
   - considering review of the Frontline Management competencies;
   - more use of case studies; and
   - a component on team learning facilitation.

There are indications that not all advisers are experienced group facilitators. This has led to these people being at a disadvantage in implementing META, and in one case the group not proceeding. A group of Victorian advisers stated that certain skills are required before commencing as an adviser. Such requirements are discussed in Section 4.9.

There are META implementations where the adviser has not been trained, for example, Moorabbin Secondary College. Others have commented that this adviser had excellent group facilitation skills. He also had access to trained advisers.

It is considered that adviser selection and training would be assisted by:

1. Identification of the skills and knowledge required by the adviser to commence facilitation of the META team.
2. Review of the training program to allow alternative components and delivery styles.

This review should consider the difficulties experienced by the advisers that the coordinators have documented, including:

- Confidence in their capacities as internal consultants
- Leadership issues with groups
- Access to regular meetings of members
- Introducing META. The META process is too overwhelming at the beginning (display on wall)
- Process with senior managers who are reluctant to engage in whole process

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- Problems in getting managers to reveal their competency profiles to competitive peers
- Obtaining commitment from senior management
- Team development across multiple locations
- Implementing META in a changing organisation structure
- Handling resentment and anger of some team members
- Time management and team commitment
- META is not a linear process in reality

Advisers responses on their training are listed in Table 13 and below. Advisers generally attended adviser training courses/workshops prior to their introducing META to their organisations. These workshops were held in different locations around Australia and usually involved different presenters. Although the individual comments on the workshops are context specific, they raise general considerations.

Table 13 Rating of adviser training

	very poor		*Range of responses (%)*		*excellent*	
Factor	*1*	*2*	*3*	*4*	*5*	*No. of responses*
Clarity of presentation	3	6	30	44	17	n=36
Methods of presentation	0	14	19	53	14	n=36
Relevance of content	0	8	31	47	14	n=36
Development of your personal confidence	11	9	43	34	3	n=35
Length of workshop	6	22	36	30	6	n=36

Reference should be made to the responses in Table 13 above. It is of interest to note that the pattern of response is similar for the first three criteria (clarity of presentation, methods of presentation, and relevance of content), with over 60 per cent of the respondents rating the criteria in the two highest categories. Of those responding, only 37 per cent rated development of personal confidence in the top two categories, with 20 per cent rating it in the lowest two categories. A somewhat similar pattern of response appears for length of workshop.

Suggestions from advisers relating to workshops were:

- facilitation training (several mentions)
- presentation skills (advice)
- process skills (facilitation, basic group dynamics, trouble-shooting)

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- more hands-on exercises—practical experience in writing Team Performance Plan and Competency Profiling
- more attention to competencies and their application—how the parts fit together
- much more work on customising
- more emphasis on planning
- (awareness of) pitfalls;
- 'tricks of the trade'
- 'How to be a META Adviser'—'apart from content centred, advisers need awareness of the role'
- ideas on pacing the program
- strategies for dealing with a large number of participants
- developing other staff to work with META adviser
- more case studies
- the change process—theories and models
- more in-depth understanding of competency assessment
- longer training period, slower pace, question-time allocation
- clarity on methods of implementation
- more emphasis on methods of ongoing review/monitoring
- information sharing from other META experiences

Further comments included reference to:

- additional half day meeting for team participants of other META projects
- if to be seriously marketed in private sector, change terminology and focus of the course
- links between META and other programs
- Group/Team skills—the adviser role must combine both democratic/team decisions and also be autocratic as teams cannot always agree
- get people to work on a specific project in their META Training - related to their workplace

Desirability of adviser training

Of the advisers responding to the question, 90 per cent stated that they believed adviser training to be essential. Reasons for this included the following:

- quality and consistency
- meeting others and networking and peer support
- clarifies process
- assists in the development of training/delivery plan

- brings detail of the kit together conceptually
- feeling of being connected to a larger thing
- must focus on training the Adviser thoroughly
- clarifies adviser role
- clarifies application of META to one's particular company

4.8.3 Adviser network meetings

Information on adviser network meetings is shown in Table 14 below. It can be seen that the advisers in the larger States received more communication and support through regular network meetings.

The advisers indicated that they have appreciated the support of the meetings in discussions with the consultants. The attendance at the meetings is relatively high, confirming the advisers' interest in this type of support.

The issues discussed at the meetings, as reported by the coordinators, included:

- Senior management commitment
- Implementation strategies
- Processes that brought the teams together
- Team selection criteria and maturity of teams to be involved
- Someone to drive the process
- Time-consuming nature of META and allocation of time to the META process
- Need for personal support in role as adviser
- Use of competency profiles, which to use and how to adapt
- Conduct of group/individual assessments
- Problems with time to meet
- Introducing personal learning and development into the META process
- Linking META to business processes

Table 14 Nature of adviser network meetings

	State					
Question	*WA*	*SA*	*VIC*	*QLD*	*TAS*	*NSW*
Meeting frequency in weeks	8	16	12	Every 8 in first 6 months	-	12
No. of meetings (to early 1997)	4	3	4	4	2	4
Average attendance of advisers at meetings in percent	70%	50%	50%	90%	-	99%
Form of meetings	Varied, tele-conference, full day	Face to face forums	Half day	Work-shops	face to face	Project updates, individual learning, network identified topics, informal networking

These issues reflect many of the statements made by advisers in other forums, such as the case studies and the questionnaires. Many of the teams applying META are newly formed and need to be developed as a team and/or prepared to progress through META, as well as completing project work as a learning process, which is relevant to the business. (see summary of advisers' questionnaires on important factor for the success of the META implementation).

The advisers provided information on their perceptions of the network meetings which is shown in Table 15. The very high proportion of 'no entry' ratings, along with comments to the effect, suggest that of the 40 advisers completing the questionnaire a number had not attended such meetings. Of those who did complete the ratings it appears that a very small proportion did not find them worthwhile.

A person who had not attended meetings made reference to the usefulness of mail-outs and another commented on participation in teleconferencing. The comment of a further person suggested that in at least one situation the meetings 'were great while they lasted'. Details on regularity of meetings appear in Table 14 above.

Table 15 Adviser perceptions of network meetings

	very poor		*Range of responses (%)*		*excellent*	
Factor	*1*	*2*	*3*	*4*	*5*	*No. of responses*
Usefulness	3	3	21	52	21	n=29
Frequency	3	10	37	43	7	n=30
Relevance of Content	4	14	24	41	17	n=29
Contribution to Networking	7	7	15	39	32	n=28

Advisers commented on the support and sharing of ideas and inspiration from others that they received from the meetings. Further comments were:

> Made you feel better to learn about the failures/problems and successes of others. A nice group of people—helped in the networking process.
>
> I found the networking with particular individuals very useful. Perhaps advisers could elect with whom they would like to network.
>
> Our team did not utilise the META networking potential as well as we could, but time was a factor.
>
> Seemed to be 99 per cent TAFE orientated—not a great focus on private industry.
>
> I think our lack of progress did not help in terms of our own contribution. I think the relevance of some of the other pilot sites was marginal.

4.9 Adviser position and role

Current advisers nominated the following as essential criteria for the selection of people for the adviser position. Where an aspect of the criterion has been mentioned more than once the number of such mentions is indicated. Because of the obvious importance of the adviser position, the entire list is presented.

- a general interest (in META)
- knowledge of META model
- previous experience or then two (advisers) per team
- credibility, respected within the organisation and people comfortable with the advisor (4)
- some understanding of CBT (2)
- theoretical knowledge of performance management as in HR practice
- the broad range of HRM skills (2)

- knowledge of contemporary management practices and demonstrated ability to implement these
- ability to communicate effectively, experienced communicator (6)
- presentation skills
- facilitation skills, confident and group dynamic skills (10)
- having done some leadership training
- experience in working with a range of training programs (2)
- knowledge of participants
- knowledge and understanding of the organisation
- able to step back to allow team to function and make decisions
- ability to keep the team on track
- forceful, but not intrusive or overpowering
- ability to note resistance/blockages and move on
- negotiation skills (2)
- flexible, creative and problem solver
- strong interpersonal skills, people management (8)
- expertise in social science research
- background in theory of effective teams and how they work (2)
- a team player, team skills, empathy with team, team building skills (4)
- some management/team leader experience (3)
- expertise in organisational behaviour (2)
- time allowed, flexibility re working hours, time to commit to team members (7)
- time to develop program fully
- voluntary
- mutual understanding with responsible managers of expected outcomes
- not members of management hierarchy (2)
- senior but with allocated time fraction
- in position to influence or use power to get started at least
- have an overarching strategic view or role
- not necessarily a management person
- some background knowledge about management practices
- thick skin!
- dogged determination
- patience
- perseverance
- able to conduct sessions with those you report to
- real champions of META and champions of change

- commitment to continuous improvement and a knowledge of management structures and competencies

How cost-effective is META?

4.10 Cost effectiveness of META

It would be premature to draw conclusions on the cost effectiveness as there are few sites where META has been fully developed at the time of the evaluation.

There are several possible measures of cost effectiveness. Information has been obtained in both qualitative and quantitative terms.

4.10.1 Comparison with other management development programs

The chief executives were asked to rate META against other professional development activities with similar aims—in terms of overall value and cost. The responses are listed in Table 16.

Table 16 Chief executives' comparison of META with other professional development activities (n=29)

Overall value	
Rating	***Response (%)***
Superior to other such programs	34
Much the same as other programs	19
Inferior to other programs	3
Unable to say	41

Costs	
Rating	***Response (%)***
More cost effective	6
Much the same	44
Less cost effective	19
Unable to say	28

The other professional development programs included in the comparisons were a wide variety. These have been listed in Appendix C.

Many of the pilot sites surveyed had not progressed greatly through the five META steps. The NSDC had expected that many teams would have substantially completed their projects by the end of 1996. Many of the chief executives who responded were unable to pass judgment at this stage on the value and costs of META. Comments included:

> Too early to say.
>
> META is a first for a young company (several similar comments)

Other chief executives were more definitive in their comments:

> Not necessarily superior, but more appropriate in many circumstances.
>
> Very time consuming and consequently high cost.
>
> Running other programs costs in time and dollars would be as high and less relevant to the workforce.
>
> Infinitely more cost effective as it mobilised internal human resources.
>
> [Costs] no different to any other management program which requires a 'culture change'

In addition, the advisers commented on the overall value of META when comparing it with other forms of professional development in the following way:

Table 17 Advisers' perceptions of META in comparison with other management development programs

	inferior to others	*Rating range (%)* <------>			*superior to others*	*No of responses*
Factor	*1*	*2*	*3*	*4*	*5*	
Relevance to goals of the institution	3	6	34	37	20	n=35
Level of participant satisfaction	3	17	48	29	3	n=35
Tangible outcomes	3	15	30	46	6	n=35
Apparent cost effectiveness	13	16	45	26	0	n=31

From this, it may be concluded that the advisers generally believed META is relevant to the goals of the institution, produces slightly better outcomes but may have some additional costs when compared to other programs.

4.10.2 Costs of META

The information provided by advisers on costs varied greatly in precision, and in the way in which the costs were calculated. Due to the wide range of returns and the variation in progress through META, no statistically sound figures could be tabulated for the small number of returns. Only 24 returns had basic costs, and a number of these were broad estimates.

The survey indicated that a team with a reasonable project to complete as well as the META process, will meet for in excess of 40 hours over the META cycle. Some teams with extensive projects have met for 100 hours and are still continuing. There have been several teams who have completed the cycle with considerably fewer hours.

Each team member has been committed for this time, plus any research, reading, completion of shells and related work completed in preparation for meetings. The adviser has similar time commitments. Typical costings of team members times have varied from $10 000 to $40 000. The size and salaries of the team obviously impact on these estimates.

Estimates for the adviser costs have varied from $3000 to $8000, except where an adviser has been employed full-time. In many cases these costs for the members and the adviser are not incurred separately by the institution, but are an allocation of an already committed or sunk cost.

A number of teams have met off-site for a special workshop, and these costs have been included. Sundry costs associated with the team operation have varied from $500 to $5000. In some cases, external consultants have been contracted to assist the team.

In addition, a number of advisers included a separate cost for the internal evaluation of the project, generally at a nominal cost of $500 or $1000.

These costs should be regarded as preliminary, as many sites have not fully completed the META process.

What is the level of user satisfaction associated with META?

4.11 Overall user satisfaction

Considerable information has been collected on the level of satisfaction with META from the perspective of the chief executives, the advisers and team members. Comments on the META strengths and weaknesses were collected from the chief executives and advisers.

4.11.1 Strengths of META—as perceived by advisers

A detailed list of strengths of META, as perceived by advisers, appears as Appendix D. The broad categories of identified strengths follows, along with some brief clarification.

- **Design**

  Advisers commented that META was relevant to current theories and practices, had a clearly structured framework and facilitated strategic planning. Its clear link with the workplace was seen as a decided strength.

- **Organisational change**

  META was seen to assist with bringing about 'cultural change' within the organisation and to improve the organisational culture.

- **Strategic focus**

  The strategic focus of META, with its alignment with the strategic plans of the organisation, was identified as a strength.

- **Team focus**

  The team focus of META was a commonly mentioned strength. Reference was made to such aspects as team development, team culture, building of team empathy in work groups, the valuing of the team process and team performance planning.

- **Staff development**

  META was recognised as providing for a collaborative approach to staff development and management development in particular. It was seen to identify personal and team development needs.

- **Flexibility**

  META was commended for its flexibility and adaptability, allowing for diverse learning strategies to achieve an end result. Importantly, it 'allow (ed) groups to experiment with processes not available to them as a matter of course in operational activities'.

- **Competencies**

  The focus on competencies was indicated by some as a strength, along with clarity of accompanying explanations.

- **Cost effectiveness**

  A reference was made by an adviser to META being 'in-house' and therefore saving time and cost.

- **Pay-offs**

  The fact that META facilitates the 'achieving (of an) organisational goal' while learning' and provides for 'high level commitment and involvement' was noted.

- **Self Review and learning**

  Several advisers commented on how META contributed to self-learning. It was seen to be 'challenging to, but supportive of, individual participants'. It provided for reading and self education and led to 'opportunity for individuals to review their own situation and position in the organisation'. It was suggested that it provided 'a mirror on past practices'.

- **Tools**

  Ease of understanding of the tools, the ability to customise, and the provision of implementation shells were further strengths commented upon.

4.11.2 Strengths of META—as perceived by chief executives

The chief executives were asked to document positive outcomes and benefits in several ways. Reference should be made to Table 18 indicating chief executives' ratings of outcomes for individuals, teams and the organisation:

Table 18 Level of positive outcomes, (responses in percentages)

	Response—Level of outcome (%)			
Area of Comment	*High*	*Medium*	*Low*	*No of responses*
For the individual	26	59	15	n=27
For the team	41	59	0	n=29
For the organisation	21	61	18	12

This group of chief executives have identified moderate positive outcomes in all areas, with the greatest impact being centred around the team. Comments about these outcomes included:

> It is still early days yet. Suspect organisation will benefit more as time progresses. (several similar comments)
>
> The change processes based on reflective management practices and aligning all teams and projects to the strategic direction is not achievable easily. But we have progressed some distance.
>
> The recent change from a program structure to a functional team structure means that teams had more to gain from any intervention of this nature.
>
> The process has had more impact on some individuals than others.
>
> more useful for teams than individuals.
>
> More teams need to be put in place to increase outcome for the organisation.

The chief executives were also asked to document major benefits from the use of META. A number of respondents felt that it was too early to provide a judgment. Other comments included:

> It is a development process for staff.
>
> It provides direction and assistance while learning.
>
> Openness between team members but needs to be ongoing.
>
> Staff who have team plans understand where they fit into organisation, [leads to] more job satisfaction and commitment. (several similar comments)
>
> Focussed team managers on current workplace objectives and strategies. (several similar comments)
>
> Developed an efficient and effective communication system across team management. (several similar comments about improvements in management team)
>
> Caused the group (ie management team) to think about how the eight best practice principles applied and what they were doing.
>
> Development of teams, introduction of new ideas. (several similar comments)
>
> … the material is up to date and uses the very theories and approaches we make to industry.
>
> We have been able to introduce a new financial planning process.
>
> Managers are prepared to delegate responsibility and work together.
>
> Assist staff to cope with change e.g. organisation structure.

4.11.3 Strengths of META – as perceived by coordinators

The coordinators recorded benefits from their own observations and comments of the advisers in network meetings:

> Use in helping with setting up work teams for enterprise bargaining
>
> Greater use of teams i.e. trust, cooperation.
>
> Provides team development structure and reinforces and complements use of team approaches in organisations and provide structure for management development

Results from task undertaken by team led to higher organisation productivity, (example given) and in other examples, META has resulted in more sharply focused needs and solutions.

> For some it has really brought their managers together; others say it has given them very clear direction for the future.
>
> Enabled one organisation to change direction very quickly and smoothly.
>
> [META can be] used as a change management agent in an organisation.

4.11.4 Difficulties with META—as perceived by advisers

A detailed list of difficulties with META perceived by advisers appears as Appendix D. These perceived difficulties relate to:

- Context of change involving TAFE/VET sector
- Congruity of META with the organisational culture
- The design and structure of META
- Requirements for adviser training
- Cost effectiveness
- Difficulties of initiating and sustaining the META process
- Maintaining a functioning team
- Finding time
- Funding of an adviser position
- The complexity of META
- The concept, interpretation, and creation of competencies
- Accreditation provisions
- Transferability to other sectors
- Provision of sufficient funding for professional development

4.11.5 Difficulties with META—as perceived by chief executives

Comments received included:

> Time (several responses), and getting the team together.
>
> Difficult to customise.
>
> Lengthy process.
>
> Cost
>
> Inducting new staff into an existing META team.
>
> The short time line associated with the requirements of the pilot project.
>
> Potential duplication of appraisal process.
>
> Connection between identified competencies and team performance plan.
>
> Has the problem of most systems in that end users have the perception of being bound by rules. Real world needs tend to jump over rules, sequence of events etc.
>
> We spent far too much time talking through process, without getting to agreed outcomes ... partly due I think to the skills of the manager/facilitator. (other similar comments)
>
> Cultural change is required to make it work. People want to be told/led/driven and not self directing at first.

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> Some teams felt META was 'forced' on them and therefore resisted the opportunities META affords.
>
> It can seem complicated.
>
> Collecting evidence against competencies … validating is difficult. We've trained some staff as assessors … but this is where we get the highest resistance. We felt the project outcomes are more important.

4.11.6 Difficulties with META—as perceived by the coordinators

Difficulties noted by the coordinators included those responses to META promotions and adviser comments:

> People are too busy to undertake the scheme.
>
> Having teams assess against the competencies.
>
> Make-up of the teams (often artificial).
>
> Too many shells.
>
> Didn't like the competencies as listed – most adapted them.
>
> The kit is not intended for participants but they often need to access more information.
>
> Some of the material is very prescriptive and therefore difficult to customise the process.
>
> Lack of resources/strategies for managing and facilitating groups and team learning.
>
> Costs of kits to NGOs [non-government organisations] who need extra copies for advisers.

4.11.7 Team members' perceptions of META

A sample of team members from each organisation was asked to respond to a short questionnaire concerning aspects of the META program. Their responses appear in Table 19 on the following page.

In an open-ended section of the questionnaire participants were invited to make any further comments. About 45 per cent of the returned questionnaires contained an additional comment. These ranged widely in content, in some cases reinforcing the response which had been made to an item in the chart and in others, making a new observation. What follows is an overview of the topics mentioned by one or more persons, with some illustrative quotations.

Follow-up to META

Reference was made by some members of teams to the desirability of ensuring that META principles and processes are maintained:

> I have enjoyed the META process – it helped me to achieve greater understanding. I do believe a follow-up program should be considered further down (the track) – say, 6-12 months after completing META.
>
> Would like to see continuing meetings and goal setting at regular intervals.

Time

Less than half of the respondents were able to agree that META had been manageable in the time available. Time emerged throughout this evaluation as a major factor affecting the success of META. The extended list of quotations that follows serves to illustrate some of the difficulties and effects perceived by members of teams. It will be noted that some of references to time are associated with particular contextual circumstances, for example:

> A difficult timeline meant that staff were trying to fit in meetings across 5 campuses at the end of the year including part-time and full-time teachers and getting together was problematical.
>
> The team is divided by location and business focus. The opportunity to follow one path has not yet arisen and the availability of time each of the Managers can contribute is rather limited by existing workloads.

Table 19 Team members responses to META

	Team member's responses (%)					
Statement about META	*Strongly agree*	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*	*No. of responses*
The META project has assisted us in the pursuit of strategic goals	16	66	12	4	2	n=189
The META process was easy to understand	7	49	24	18	2	n=189
The META process has contributed towards changes in the culture of this organisation	10	44	30	14	2	n=189
I have developed my competencies or added to existing competencies through the META project	6	51	25	16	2	n=188

META has contributed to team competencies	14	50	23	11	2	n=188
META has helped me in planning for further professional development	10	44	30	14	2	n=187
META has been manageable in the time available	3	40	16	34	7	n=188
The META team process is relevant to my role in this organisation	24	54	16	10	2	n=188
META compares favourably with other management development programs I have experienced	6	44	43	6	2	n=161
Resource material provided in team sessions has been relevant to the team's needs	6	75	12	6	1	n=181
I am pleased to have been involved in the META process	23	61	12	3	1	n=181
The project/task the team has been working on has been satisfying to me	11	57	20	9	3	n=181
META has contributed to team's ability to achieve its goals	13	56	22	7	2	n=181
During the life of the project, the team is operating more effectively because of the META process	8	41	39	10	2	n=176

At the time of the META Program we had difficulties with availability of time and also were experiencing industrial problems.

Timing has been an issue for me individually and for the team I have been in. It has been difficult to add the demands of META to an existing workload which is very full on.

Some participants noted that the time constraint prevents potential benefits from META being realised:

> With a greater investment of TIME to thoroughly pursue the process, more benefits could have been obtained …
>
> (A) structured approach can be an impediment, if time frames are short!

That there could be detrimental consequences of investing too much time in a program such as META is suggested by such comments as:

> With an already lean and very fully occupied management team, it was difficult to invest (further) time and still attend to the ongoing critical management of the institution.
>
> The critical factor is time. Given the time required by our team I am not convinced that the time invested produced a commensurate outcome.
>
> Progress is slow. No change is detectable and the goals of the team are yet to be realised. The time taken is proving to be costly in terms of the neglected duties.
>
> Couldn't see much value in the program at all. It took up a lot of my time for no discernible outcome.

The feeling that META should allowed for in one's workload, rather than be considered an addition, was evident in discussions at one of the case study sites. This was also suggested by the questionnaire response:

> This program requires more time than I have been able to spend. It should be utilised at college level and time set aside for this.

The time problem of managing ongoing responsibilities and engaging in the META process was not found insuperable by the respondent who commented:

> After a difficult period of combining day to day H.O.D. responsibilities with our META Training, the META outcomes achieved have been rewarding.

Organisational culture

As indicated in the Table 19 over half of the respondents considered that META contributed toward changes in the culture of the organisation; however, 15 per cent detected no such change. Some in fact reported that the prevailing culture itself hindered the progress of META:

> The organisation has no commitment to the process, so while it helped the team, unless we are able to communicate our needs and have them heard by executive, nothing much will help.
>
> Cannot run such a program when management is unwilling to compromise, and feel the way they do to staff.
>
> The META process was useful. Dysfunctional organisational personnel not believing in the process influenced its success. Also promises made during the process were not met by several of the personnel.

The META process

Several team members in their additional comments made reference to process:

> Awareness of process and theory behind (it) is useful.
>
> The competencies are highly relevant and useful for professional development planning and performance appraisal. The process is cumbersome.
>
> I find it a little confusing with a lot of paper work and I feel that time is not used effectively. I feel there is a lot of talking and discussion, but not enough action. I feel it would be a good process if it was quicker and not so time consuming.

The relationship between processes and the specific task was a topic that arose frequently during evaluation interviews and again, in the open-ended section of this questionnaire:

> The process is long winded and sometimes hard to see the benefits immediately.... 'Process' tends to dominate 'Performance' making outcomes hard to define and obtain a feeling of success and achievement.
>
> I believe the project undertaken was inappropriate for META. I feel that META would be useful if matched to an appropriate project.
>
> One of the most striking experiences of the META process has been the difficulty the team has had in distinguishing task from process – making the distinction between the team performance plan and the objectives of the plan – we mix them up.

The extent to which Teams felt able to deviate from the META strategy as outlined in the kit appears to have varied. Individual comments included:

> The competencies of the team seemed already in place so the META process seemed to slow us down. We were used to working cooperatively and setting appropriate goals and were able to do this despite the META process.
>
> … I found that the META process seemed to hinder our efforts to achieve our goals. I appreciated the time allowed to work with team mates.
>
> I personally found the idea of working in a team to achieve a goal useful to the Department appealing. However, this particular process seemed to present barriers to achieving the goal through overly stringent 'step by step' style documents, ambiguous language and an overall unfamiliar format.

One member of a team commented on what he perceived to be the relatively high cost of running META in the organisation in relation to what the Team Approach had achieved. He added:

> What we need is a basic, concise, readily applicable strategic plan which can be applied to all groups (sorry – teams) participating in this META system.

Perceived benefits

- ### Teamwork

Being involved in META was valuable because it allowed us to work as groups on a project we felt was/is worthwhile.

Team planning activities have brought two of my teams (both were not operating as teams prior to META) into well organised work units.

META has helped unify (us) into a closer knit group.

Excellent program, which has guided and developed a stronger individual and team commitment.

- ### Providing focus

I believe our team members already work well as a team. META was probably helpful by having us focus specifically on some useful projects.

- ### A Wider professional development program

Overall the exercise was worthwhile and led to a strategy of bringing in guest speakers from a variety of organisations on change management.

- ### Better budgeting

The team was very pleased with outcomes – Team Plans, Individual Plans, and identified training needs meant budget could be spent on relevant work related needs.

- ### Clarification

The META process was trialed in the [network] which is managed by a committee structure of people drawn from very disparate organisations. The structure which META imposed assisted committees greatly in re-addressing their reason for being and what their priorities needed to be. Having the assistance of a 'META' trained facilitator was also a great help.

  - Board members... do not have the 'luxury' of working side by side as would occur in most corporations/organisations. Time constraints are extremely limiting, and there is not much backup support from informal 'corridor chats'. I have found the META process incredibly valuable. It is very practical and useable.

- ### Interaction

A large benefit of the program has been to be able to share with staff at a similar level, frustrations and discussion of common issues.

- **Taking stock and setting directions**

  The META process gave us the opportunity to step back from our daily work to talk about where we needed improvement and to give us the impetus to discuss, set goals, and achieve these improvements. I would recommend META to everyone.

  Allowed me to focus on goals for myself and the organisation during a rapid period of change.

- **Facilitating change**

  The META process allowed the development and implementation for a change in the way in which the organisation presents its business.

- **Transferability**

  Not sure that ranking competencies is sound but overall I feel META has been a valuable learning experience – readily transferable to other situations.

- **Management**

  This process was and will be of benefit to current and future front-line managers.

Perceived problems

- **The META materials**

  Comments varied on the META Kit and materials:

  This package was poorly introduced. It was not self-explanatory – the manual used 'unfriendly' language. It did not translate well from a management focus to a teaching focus. The self-paced module style thwarted the dynamic, creative and enthusiastic approach to teamwork that teachers employ in their projects.

  I think that the structured approach and the proforma documents are useful.

  I found the resource kit rather wordy; felt the process could be simplified.

- **Staff turnover**

  META would have been more valuable in an area where there is a more stable staff. Staff turnover is not conducive to a long-term project such as META.

  Staff turnover has been problematic.

- **Entrenched culture**

  Entrenched culture is the problem (i.e. reason why META is not succeeding in another section of the organisation).

- **Frequency of meetings**

  Process has been too long because meetings are too infrequent.

- **Sustained commitment**

  Problems have arisen i.e. team commitment because of higher priorities.

Some further issues

Distinctiveness of META

One respondent marked all of the response items in the questionnaire as 'uncertain' and added the explanatory note:

> Sorry for the level of uncertainty. I am still unsure of exactly what META is. Our college is very heavily focussed on team based management and has been for the last several years. Not sure if META has added to or just duplicated what we already do.

Delivery of META

> The skills and principles are pertinent and have been useful. The team involvement was also useful. But I have doubts on: (1) Were the skills clearly delivered – does everyone know what they learned? (2) Were the skills efficiently delivered? Could the skills be crisply and concisely delivered in a shorter time frame?
>
> The concept is good, but the detail and the operation did not really come together for me. However, I appreciate the opportunity to be involved.
>
> META is time consuming – needs abbreviation and strong facilitation. It needs to be linked by Management to other frameworks – AQC Quality and Corporate Plans.

Internal Evaluation

> The project seems incomplete to me. We have not revisited, reviewed or evaluated in any way the work we did in 1996.

Support

> The concept of META is a very good one. I enjoyed being involved in the process – it is relevant to our organisation (and my individual) needs; however it didn't really get off the ground or was supported as it should be. Other activities and changes occurring in the organisation and META became just another 'thing to do'. I would have liked to have seen META utilised properly as it has good concepts which we didn't make the most of.
>
> Would have liked stronger guidance/monitoring from TAFE. The attitude appears to be that anything goes. And I'm not sure that the meetings of facilitators achieve anything.

Materials

> The materials were generally good but there was considerable confusion in the application of the term 'organisation'. A team within an organisation might be developing goals etc. but they are team goals, not organisation goals – many references in text thus become confusing

4.12 Satisfaction with META materials

The coordinators have been able to make their own observations and have received comments on the META materials. The following summarises their comments:

Comments on Kit

Overall most people are impressed with the material

Changes should be made to kit, *but the On-line delivery may be sufficient*

Suggested changes to Kit

The coordinators commented that the kit should be changed in a number of ways including:

- Self assessment case studies/methods
- More information on selection of team members
- Include a preliminary 'adviser foundation shell' with issues, pitfalls, suggestions for adaptation etc
- Provide options and strategies for getting started for new and existing teams.
- Fewer words, more diagrams.

These comments support many of the summaries made earlier. It would appear that additional materials and diagrams on getting started, and the addressing of issues and pitfalls would be appreciated. Despite many groups not as yet completing the META process, the coordinators, have identified powerful benefits for using META.

In addition, the kit has been rated by advisers as follows:

Table 20 Advisers' rating of META Kit (n=40)

	very poor	*Range of responses (%)*			*excellent*	
Criteria	*1*	*2*	*3*	*4*	*5*	*No. of responses*
Overall design	0	8	26	6	20	n=39
Readability	5	8	26	48	13	n=39
Layout	0	3	31	48	18	n=39
Useability	8	5	41	36	10	n=39
Appropriateness	0	13	33	39	15	n=39
Ease to adapt (Customise)	0	5	38	41	16	n=37

Of interest was the use of competencies in the various teams. The responses from the advisers were:

Table 21 Application of competencies in META project

Competencies used	*No. of responses*
Taken from META unchanged	14
Adapted (customised) from META	14
An existing set of competencies from another source	3
Created specially for project	4
Other	1

4.13 Advisers' comments on the META model

Advisers were asked to rate the effectiveness of the design of the META Model from 1 (ineffective) to 5 (very effective).

Table 22 Advisers' rating of META model

	ineffective				very effective	
rating	1	2	3	4	5	
numbers	0	5	12	13	5	(n=35)

The accompanying reasons provided by the advisers for their ratings are listed below:

The Model

The model is sound and reflects good practice in HRD and it allows for flexibility and continuous improvement.

It is up to date with the thinking and practice of industry sectors.

Steps

There needs to be more analysis of the order of process steps – especially the notion of putting Module 2 before Module 3.

Too process oriented.

Step by step approach that gave sufficient theoretical advice.

Context

Will probably only work in an open management structure.

Clarity

Easy to use templates; process is clear.

The language is off-putting to some participants.

Clear, comprehensive. Some more emphasis on clarifying what competencies are.

Some of the steps are a bit cumbersome.

Model very easy to follow.

Complexity

The model is sensible, practical but does require highly sophisticated skills for successful implementation.

... the process is complicated and needs refining.

It's too rich and complex for some people to grasp. It relies on a culture willing to change and needs considerable groundwork to be done where this is not so.

The material tries to do too much – overwhelming.

Still too early to fully evaluate. However, it is disadvantaged by the competency model which can be a whole process on its own.

For this particular team the complex appearance of META was a barrier.

Teamwork

It is very relevant to teamwork and Team Performance Plan is 'real work, real time'.

The process could be very effective, however unless it receives support from the whole team it is not as effective as it could be.

General

I think META is useful, however how it is applied is critical.

Considered one program for management processes among many.

The implementation shells serve as an excellent means of quantifying the various aspects of (the) team's functioning.

Unable to comment – process has not been used to its full extent.

Associated with the advisers' rating of the META model were a number of suggestions for changes to improve the model and to clarify other aspects of the scheme. These have been collated into the headings below:

Simplify

Simplify the process.

Simplification of the competency assessment material.

Simplify language.

More flexibility i.e. time-frame, given the significant changes taking place.

Not (change) to the model but certainly to the support kit which is far too complicated and wordy to be useful.

Competencies

Less emphasis on competencies.

Simplification of the competency writing process, or assistance in creating.

If META Competencies are not appropriate, a list of resources needs to be provided to enable participants to tailor their own.

... The most challenging part is the competencies and [this is] potentially the part which is most prone to getting bogged down on.

Update competencies. Add some more team building tools.

The Team Competencies Shells seemed harder to understand. An induction process for new staff coming into an established META Team is needed.

Aids to understanding

There is no overall 'process map' to assist in understanding.

A summary of an ideal process would help.

Some terminology needs review to be consistent with examples in the kit e.g. team performance plan -> project plan or similar.

Samples of team performance plans and management development plans.

More options in the Part 3 proformas (i.e. multiple options). I am doing a lot of adaptations.

More advice on the application of META.

More suggestions on using the model flexibly i.e. combine with action learning.

Case studies on demonstrated benefits of META implementation.

Steps

Streamline 'getting ready' and ensure assessment instructions are clearer.

Signed Management Agreement not necessary.

Change is needed in emphasis, with less time on the performance plan and more (on) the latter steps.

Implementation

Tie the project in more with a work-based project.

I think it would help if the advisers are requested to have or first develop facilitation skills.

Provision of shells on disk.

4.14 Advisers' reflection on the conduct of projects

On being asked to indicate any changes in emphasis that they would make to their projects, in retrospect, 26 of the 40 respondents offered some suggestions. These fell under the following broad headings.

Commencement

One adviser stated that 'n retrospect META should not have been used with this team at this time'.

Introduction

One adviser felt that more time should have been given in the early stages to explanation about META. Another believed more team work to have been desirable earlier on, because it was found necessary later in the process to go back and do some group work, plus some values and mission work.

Team

Several advisers referred to aspects of the team or teamwork. One commented on the major problems of keeping a team of managers together, but did not indicate what would be done in the future to facilitate this. A strategy suggested by a further adviser that could help in this regard was to spend more time with the team members.

An adviser who had apparently worked with a less than vibrant team considered a desirable change to be 'a committed and enthusiastic team supported by senior management'. The effective functioning of a team was seen as essential to other processes:

> The META process has good tools, however unless a team is able to work together, the tools are difficult to utilise.

Competencies

Competencies drew a number of suggestions for change from the advisers. Whereas one adviser would wish to spend more time on competencies, another would spend 'less time on competency analysis and more time on project achievement'. The approach to competencies was seen as a concern by the adviser who noted:

> I would be more directive/creative etc. in the way I introduced the competencies – senior managers were fine, but work team leaders found them irrelevant.

A change in emphasis that one adviser would make was stated as 'clearer relationships between individual and team competencies'.

The source of competencies was considered an issue by the adviser whose experience suggested the future use of 'customised competency profiling to fit Team Performance Plan— not... META ones'. Another adviser stressed the need for developing 'work related competencies'.

Team performance plan

A number of advisers would change the emphasis they gave to the Team Performance Plan, as reflected in the comments:

> The Team Performance Plan is CRITICAL. It must be right! – it is the trigger/catalyst for development of team/individual competency profiles.
>
> The META kit confuses people about the relationship of the 'team performance plan' to the 'development plans' and this needed to be reset about half way through.

Management development plan

Changes in relation to the Management Development Plan included:

> Greater emphasis on the Management Development Plan – requires good deal of research to get accuracy/relevancy.
>
> Completion of the competency development process and preparation of a Management Development Plan should be part of Executive META Agreement.

Other changes in emphasis

In the presentation of META one adviser commented that on a next occasion there would be a need for 'more direction/coercion required from (the) adviser'. Another adviser noted that 'META requires some formal steps. These should have been more thoroughly achieved.' Yet another adviser felt that 'a clearer method of organising' would be needed in future.

The allocation of time and determination of priorities would need reviewing in a future program, according to advisers who commented:

> META was assigned a small portion of full day. Too many other objectives, apart from development, were assigned to the session.
>
> More time spent on organisational culture and team/individual competencies – budget considerations were all-consuming.
>
> Further individual comments relating to use of META were:
>
> Very academic process – requires streamlining. May be appropriate for 'fixed' programs and small units, but in constant changing environment of large organisation is best referred to as a guideline.
>
> META is not an exclusive strategy. Other methodologies exist and should be acknowledged.

What is the evidence of transferability of META to other professional development programs?

4.15 Transferability of META

Evidence from the case studies is that META is used in professional development in several ways, namely:

- as the basis for the professional development program, from which learning occurs directly, and to generate a plan for other professional development activities for the team is produced and implemented;
- as the sole source of professional development;
- when integrated into an existing professional development program, often with the META components not being identified as coming from META;
- where particular aspects, such as some of the shells, or the approach taken in one or more steps, are incorporated into the professional development program.

It would appear that Best Practice Principles incorporated into the META design are being taken up or assimilated into the professional development. These patterns have been repeated in the survey.

Table 8 in Section 4.5 shows that META was incorporated into an overall professional development program in about 37 per cent of the sites surveyed. Responses from chief executives and participants as reported in Sections 4.10.1, 4.11.7 and Appendix C indicated a wide range of professional development programs had been or were being implemented in these sites alongside META.

Therefore the impact of META in terms of Best Practice Principles appears to be substantial. In addition, there appears to be a congruence between META and many other programs.

What is the evidence of the Best Practice Principles in META implementation?

4.16 Best practice principles

META is based on addressing eight Best Practice Principles. Evidence of these principles in the META implementation was sought from the chief executives (refer Table 23) and the advisers (refer Table 24).

Table 23 Evidence of best practice principles in META team activities—chief executives

Best practice principle	*Responses (%)*		
	Yes	*No*	*No. of responses*
1 Supports the strategic & business plans of the organisation	100	0	n=27
2 Meets the needs of the organisation, the team and the individual	89	11	n=27
3 Encourages diversity and flexibility in learning strategy	71	29	n=28
4 Is competency based	86	14	n=28
5 Is team oriented	100	0	n=30
6 Articulates with accredited education and training and recognises RPL	48	52	n=27
7 Incorporates equity and promotes cultural diversity	70	30	n=27
8 Is career long	64	36	n=22

From the responses, there are some principles that have been identified as being largely met, namely principles 1, 2, 3, 4, and 5. The principles where there is some doubt about their application were numbers 6 and 8.

The META product does not give detailed instructions on the process of articulating with accredited education and training. There are a number of alternative options that team members could choose, and these options have increased and changed since the product was launched. This is one area where future developments of META may provide additional advice.

The pilot program has been going for too short a time for the principle of career long development to be trialed. In theory, there are options for the team to cycle a number of times through the META process, each time adding to the management development of the team.

Table 24 Identification by advisers of best practice in META team activities (n=40)

	Extent META application exemplified principles (%)			
Best practice principle	*High extent*	*Medium extent*	*Low extent*	*No. of responses*
Supports the strategic and business plans of the organisation	82	13	5	n=30
Meets the needs of the organisation, the team and the individual	55	37	8	
Encourages diversity and flexibility in learning strategy	28	59	13	
Is competency based	32	54	14	n=37
Is team oriented	82	15	3	n=39
Articulates with accredited education and training and recognises RPL	11	30	59	n=37
Incorporates equity and promotes cultural diversity	18	49	33	n=39
Is career long	21	45	34	n=38

Examples related to these principles included:

> We are in the process of implementing an optional action research phase which will provide senior managers with Graduate Certificate in Leadership. The greatest difficulty we have is with staff collecting evidence against the competencies.
>
> [The process] being tied in with Strategy and Directions of Institute 1997-2000.
>
> [The process] adapted by Education Planning Team for support in profiling, research and team competencies.
>
> The team performance links directly to strategic directions.

Other comments included:

> [Principles] 3 and 4 are the key examples of keeping in touch with what industry requires, involving the education industry.
>
> Reinforces principles of adult community education and community development which are central to our organisation.
>
> no evidence yet *on a number of the principles.*

In Section 4.10.1 Table 17 lists a comparison of META with other forms of professional development. It would appear that META is seen by many as a good, better or more appropriate form of professional development approach, but many can see worthwhile aspects in other programs.

> How effectively has the META scheme operated? What are the strengths and weaknesses of the model?

4.17 Effectiveness of META

Advisers were asked to indicate the extent of their confidence that the intended outcomes for the META project in their organisation would be achieved in relation to the individual, the team and the organisation. Reference should be made to the findings shown in Table 25.

Table 25 Advisers' expectation of project outcomes

	not at all confident		*Range of responses (%)*		*very confident*	
	1	*2*	*3*	*4*	*5*	*No. of responses*
In relation to the individual	5	20	26	46	3	n=39
In relation to the team	5	26	20	36	13	n=39
In relation to the organisation	8	23	20	36	13	n=39

Reasons for confidence

One adviser felt confident about the achievement of intended outcomes because over 60 per cent of the staff in the organisation had Team and Individual Plans. Confidence was expressed by other advisers that staff 'will continue their performance plans (and that) the work will be built upon and is being followed through still.'

One adviser who had expressed only medium confidence in relation to the individual team member was confident about the achievement of the team and the organisation outcomes, but added:

> only because of the pilot funding. If we did not have that funding to back up the META Project I think it would be the ('not at all confident' category) that I circled.

Another adviser who had marked middle level confidence in relation to the individual but greater confidence for the team and organisation, noted the problem of a 50 per cent turnover of the team since inception and at the end of the year 50 per cent left the organisation.

Although expressing confidence in the achievement of intended outcomes advisers noted:

> The maintenance of META is difficult when going through periods of great and rapid change. The desire to make arbitrary decisions is very hard to resist.
>
> Different members of Executive Management appear to have different intended outcomes.

Reasons for lack of confidence

Comments made by advisers who indicated general lack of confidence in the achievement of intended outcomes for the META project were:

> ...There always seems to be a reason why this program is NOT given priority by members – they're too busy fighting fires to actually plan and take charge of their own, their team's, their organisation's future.
>
> We have major issues of time and resources. This is a common excuse, however, it does come down to priorities and it is a question of whether META priority will be raised.
>
> There was insufficient commitment to the process by some senior managers. [It] will be difficult to extend downwards without support.
>
> It is difficult to maintain the process when we have been subjected to very rapid change due to funding cuts. It would have been useful to utilise META in the change process but the team had not developed enough with the process.
>
> Our manager is fairly autocratic so the idea of us really having much power as a team involves (that person) changing – fairly unlikely.

4.18 Factors affecting the development of META

Advisers were asked to consider the list of 24 factors which had been derived from case studies, interviews and documentation and which could possibly influence the way in which META had progressed in their organisation. They were invited to add any further factors.

Table 26 Comments on implementation factors identified in case studies (n=40)

Factor	*Extent factor is an influence (%)*			*No. of responses*
	High	*Medium*	*Low*	
Support from the administration	72	18	10	n=39
Prior team development skills of an adviser	63	22	15	
Previous experience in META trials	8	24	68	n=37
Consistency between organisational culture and META principles	55	35	10	
Length of time adviser is available	55	21	24	n=38
Motivation to adopt META	75	22	3	
Team building activities	72	28	0	
Level of trusts between participants	78	20	2	
Extent to which a team already exists	46	28	26	n=39
The composition and background of the team	41	46	13	n=39
The size of the team	23	49	28	n=39
Type of team (management team, work unit, project team)	34	34	32	n=38
Continuity of team membership	53	39	8	n=38
How META is introduced/induction	55	40	5	
How team leadership is perceived and handled	64	26	10	n=39
Relative emphasis given to task and process	54	32	14	n=37
Use/appropriateness of team performance plan	49	49	2	n=35
Perceived importance of the task to the individual/team	73	19	8	n=37
Selection/development of competencies for team	37	46	17	n=35
Emphasis placed on individual competencies	30	38	32	n=34
Use made of META literature	18	62	20	n=39
Integration into the organisation's professional development plans	52	33	15	
Amount of time available	80	13	7	
Evidence of achievement of outcomes	61	34	5	n=38

It appears that the list presented was sufficiently comprehensive to include most factors thought to be relevant by the advisers. A number of the additional factors mentioned below are closely related to those in the list. Advisers indicated the following:

- internal climate, e.g. restructuring taking place
- the organisational culture at the time (division between Executive Management and others)
- insecurity from lack of corporate vision by Government Head Office
- support from Executive team members
- skill of adviser in facilitation of process design
- bringing in outside facilitator for team building and competency assessment
- constant changing of team functions and members
- team seeing it as a worthwhile project and what's in it for the individual
- other departments drawing on the META program to assist in their planning and development of teams

In addition, a number of issues arising from the initial case study teams were listed for the advisers to comment on, as shown in Table 27 below:

Table 27 Survey of importance of some case study team issues (n=40)

	not an issue	*Range of responses (%)*			*major issue*	
Issue identified	*1*	*2*	*3*	*4*	*5*	*No. of responses*
Lack of clear notion of the adviser role	32	21	21	13	13	n=38
Staff unwillingness to be involved in META	25	15	18	35	7	
Disparity between organisational culture and the META principles	10	23	13	38	16	n=39
Sustainability of project(s)	5	24	24	26	21	n=38
Limited information about course credit transfer (RPL)	38	16	19	16	11	n=37
Organising an internal evaluation of META	24	26	18	32	0	n=34

It appears that some of the issues identified in the case studies have not been reflected across the larger sample of sites included in the survey.

4.19 META within an organisation

The chief executives were asked to comment on several aspects of META within their organisation in order to determine:

- the support received and required for successful implementation; and
- the impact of META on the organisation culture; and
- potential for ongoing use.

4.19.1 Level of support required

Table 28 shows the responses from chief executives on the level of support META requires from the executive staff of an organisation:

Table 28 Level of executive support META requires (N=32)

Level of support	*Percent response*
High level	81
Medium level	16
Low level	0
No reply	3

The majority of chief executives involved in META believe it requires a high level of support. This is confirmed by State Coordinators who have commented on the need for senior executive support. Comments made by chief executives included:

> It [META] involves asking your staff to do what they normally do, only in a more rigorous and reflective way. Executive needs to model that this is how 'they' operate too.
>
> Without executive sponsorship, it won't be followed through.
> (several similar responses)

There is a wide range of mechanisms and resources used to support META within organisations using META. These included providing allocated time for advisers and the participants, providing time (and in some cases travel funds) to attend adviser training and adviser network meetings, and personal support to advisers and team. Other comments included:

> Direct input from board of directors. (several responses)
>
> Publicity within [the institute]. (several similar responses)
>
> Integrated into operating plan. (several similar responses)

A number of chief executives did not respond to question C7 asking 'what further support from within or outside your organisation do you feel to be desirable?' Comments received included:

> A need to import consultants to evaluate and provide ongoing input.
> (there were several similar comments)
>
> Connect back to original reference group for peer appraisal and overall projects.

A need for quality training for the adviser. (In this case, the project related to quality implementation, and adviser needed to facilitate the quality implementation process)

> Plain English guide to the manual. Significant training required to use the process.

Also mentioned in several forms was the use of other competencies, such as the Frontline Management Competencies. There were a number of comments that META is useful in implementing organisational or procedural changes.

4.19.2 Development of organisation culture

As a management development approach, META is designed to foster a team-based culture in the client organisation. The chief executives responded to questions in this area as follows:

Table 29 Compatibility with organisation direction (N=32)

Level of compatibility	*Response (%)*
Very compatible	53
Reasonably compatible	44
Not at all compatible	0
No entry	3

Table 30 Facilitation of cultural change across the organisation? (n=30)

Degree of change	*Response (%)*
Considerably	7
To a fairly great degree	16
To a reasonable degree	37
Minimally	20
Not at all	0
Future impact only	7
Unable to say	13

Despite the small number of responses, there are strong indications that META is compatible with the organisational directions, and in some cases has contributed to a fair amount of cultural change. The comments on META within various cultures included:

> META as such is not strictly implemented, i.e., forms etc. But the process is followed and adapted to our own cultural change processes.
>
> As a relatively new company we were primarily concerned with procedural matters as there had been previous input into policy.
>
> A vehicle for cultural change.
>
> Targeted groups using pilot and then intend gradual implementation using members from pilot in their own work teams. (similar comments have been made in other forums and in other responses)
>
> Change was occurring through other processes. META has helped to consolidate this change. (several similar comments)
>
> Opened up a lot of questions about who is in what team and degree of knowledge of some managers about strategic overview.
>
> We wasted a lot of time on process and the META team has not interacted so far with other groups within the [organisation].
>
> Use of competencies will affect whole organisation.
>
> Unless everyone is committed and accepts that a change needs to occur, the result is minimal.
>
> The staff participating in META have moved to a team management approach. Some staff have difficulty in coping with this concept.

Thus the chief executives appear to be comfortable with the style of professional development contained in META, while being conservative in many cases on the actual impact. This is to be expected, given that many pilots are still in the early META steps.

4.19.3 Plans to use META

Many chief executives plan to continue to use META. Of the 27 responses, 25 expect to encourage future use of META, with only 2 not proposing to continue. Reasons given included:

> Worked reasonably well to date.
>
> The META concept suits the direction in which the Institute wishes to go. (several similar comments)
>
> Managers seem to be supportive.
>
> From a chief executive just commencing a META application: If it lives up to its obvious potential, the team approach will, we hope, become an integral method for our cyclic planning function and evaluation processes.
>
> Use as a team building activity and for identification of competencies for individuals/team regardless of the Management Development Agreement.
>
> [I] would draw on elements from the program and integrate it with other activities.

In addition, there were a number of positive comments about the appropriateness of META.

4.20 META On-line

The comments received from coordinators were brief, partly due to lack of detailed information on what is to be included in the on-line package.

The main advantages perceived covered the updating of the materials to include additional requirements, the flexibility of access to the materials, opportunity to engage with new delivery forms and the ability to customise the shells.

The disadvantages identified centre around access and sufficient familiarity to use the on-line facility. In one response, it was indicated that many organisations currently do not have access to the Internet.

The coordinators suggested the following should be included in META on-line:

- include more cases studies, examples and suggestions for customisation.
- include a bulletin board, discussion group or similar facility, to allow exchange of information.

In addition, the comments on the existing kit as listed above should be considered.

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Advisers comments

META advisers were asked to make any suggestions for improvement that should be considered in relation to META becoming available on the Internet. Just over half of the advisers responded to this request. Several expressed considerable enthusiasm for the initiative. Suggestions were:

> META Adviser Network– log questions on.
>
> availability of shells etc. and ability to modify.
>
> good for customisation i.e. download and change.
>
> need summarised sections – use as overheads or brief handout notes.
>
> very clear and detailed index would be most useful on Internet.
>
> straightforward language—a moderation of 'management' style jargon—closer relation to individual's work.
>
> could include team-building activities or suggested readings, resources etc. for this.
>
> more tools.
>
> extra help for the competency writing process. Perhaps copies of competency alternatives that could be downloaded.
>
> in the form of outline checklists—leaving explanations as appendix.
>
> (avoid) too much reading material, especially which states the obvious—shells useful.
>
> simplification of Management Plan, and Competency Assessment Exercises.

Other comments were:

> Needs to be very thoroughly evaluated over time as it could mess up organisations if used the wrong way.
>
> I prefer a book to write in and use.
>
> It would be useful as an adviser to know how much variation from the process would be reasonable, while still calling it META.

5 Conclusions

The following conclusions emerge from the findings of the evaluation:

- In many organisations, META is not well-advanced.

NSDC Pilot Implementation Program

The approach taken by NSDC in funding pilot sites has allowed a range of experiences to be developed and evaluated. This has provided a rich body of material and experience.

META implementation at State/Territory level

META implementation has varied between States and Territories, in terms of progress expected and local project evaluation.

Commonwealth funding for META has varied considerably between the larger and smaller States and Territories, with consequent limitation to its potential development. There has been significant supplementary funding in some States, which has increased the level of take-up and support.

Key factors in an organisation

Key organisational factors for the successful implementation of META have been identified as:

- Support and proactive commitment by the chief executive and support from other senior executives: 'Endorsement from the organisation's board is valuable. It is also important that the senior manager in the team indicate active support verbally and by action.'
- The desire of the chief executive and the senior management to move to (and implement) a team-based style of management:—'Expression of support for META while displaying an autocratic style of management has caused confusion in some sites.'
- Allocation of sufficient time for the adviser and the team(s) to prepare for and complete META: 'META is time-consuming for completion of both the project and the process.'

- Priority accorded to META within the organisation: 'META has not always been given sufficient priority so that a team can meet regularly with few members absent.'
- Whether the project selected for completion by the META team is given a high organisational, team and individual priority: 'Where the project outcomes are required by the organisation, the executive support for the META team appears higher, and there is incentive for the team to complete the META process as well as the project.'
- Selection of an adviser(s) with the appropriate skills, who is given the appropriate authority to implement META. (see separate section)
- Level of trust developed between team members.
- Motivation by the team members to adopt META.
- The use of team-building activities.
- Compatibility between the prevailing culture of the organisation and META principles.

The Adviser

The adviser is seen as a key person in the successful implementation of META. The responses have indicated that the adviser needs to bring a range of skills, experience and knowledge to the position. These can be summarised as being:

Skills and experience

- Skills in facilitation and management of group dynamics.
- Good interpersonal skills on one-to-one and with groups, including negotiation.
- Skills in range of communication approaches.
- Training and experience in training and learning methods, including competency-based training.

Knowledge

- Knowledge in one of more of the following:
    - Social science
    - Organisational behaviour
    - Human resource management
- Knowledge of management theory and practices
- Knowledge of action learning and flexible delivery approaches within the VET sector.
- Knowledge of META.

Other

- Interest in the META product, model and implementing META in the organisation that is demonstrated by championing of META.
- Credibility and respect in the organisation.
- Empathy with, and style to suit, the team.
- Willingness to persist.

The adviser training is regarded by advisers as important or essential.

Adviser network meetings have been beneficial, providing support and networking.

Advisers have reported that they need to spend time on managing META as a recognised part of their work. There has been considerable variation in the amount of time organisations have allocated to META advisers.

The Team and META

Teams of Managers, Senior Management Teams, Current Work Teams and Special Project Teams are involved in META, with the Team of Managers and Senior Management teams being the most common. Positive outcomes have been reported across the range of teams.

Marketing of META

A high proportion of attendees at META launches and those purchasing the META have used META for a variety of purposes. At least 60 per cent of those not currently using META have stated their intention to do so in the future.

Launches have proved to be a successful means of marketing.

META experiences and outcomes from pilot teams appear likely to be a source of additional marketing material.

The Competencies

In many organisations, competency development has not, to this time, been a prominent component of META.

Design of META

Difficulties associated with the META model and materials have been identified and recommendations for modification have been made by those involved in the META program and detailed in the evaluation report.

Outcomes

META appears to have assisted organisations in cultural and organisational change.

The range of benefits identified by all groups associated with META is wide, suggesting that it has made significant contributions to participating organisations.

Most of the Best Practice Principles have been identified in current implementations of META. Principles not well developed relate to articulation with accredited education and training, equity and promotion of cultural diversity.

Cost-Effectiveness

In view of the early stage of development of META in many organisations, it is premature to be definitive concerning its cost-effectiveness. It is considered to compare favourably with other professional development programs.

META On-line

The Internet has been a common means of communication between State Coordinators and advisers in only two States.

While many were looking forward to the introduction of META On-line, and expecting additional facilities, the level of access is uncertain. Back-up written materials may be required for some time, especially for promotional purposes with people not familiar with on-line systems.

6 Recommendations

In line with the conclusions, it is recommended that:

1 Continuing funding and other resources be found to maintain and expand the adviser networks and to include people in remote locations.

2 The information collated on the factors for successful use of META be published, perhaps as a 'readiness checklist' for organisations considering the use of META.

3 Guidance on team-building activities be included in the META materials.

4 Information on the required adviser skills, knowledge, attitudes and support be published to assist organisations selecting advisers.

5 The adviser training be reviewed in light of the findings on adviser skills and knowledge. It is possible reference could be made to relevant existing training programs in the META materials. It may be desirable to make supplementary training available to existing advisers.

6 The META materials be reviewed in light of comments on the materials and model.

7 A program of ongoing marketing be recognised as important. State-based activities have been successful in the past and should be continued.

8 Additional material on competencies, selection of competencies and alternatives be included in the META materials.

9 Written materials continue to be published to support META On-line.

10 In view of the plans for META On-line it would seem desirable that access to this facility be investigated and induction to the technology be provided where needed.

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Case study

BARTON INSTITUTE OF TECHNICAL AND FURTHER EDUCATION
MELBOURNE

Introduction

Barton Institute of Technical and Further Education is located on two campuses at Moorabbin and Richmond in the eastern Melbourne suburbs. The Moorabbin campus is the newer and larger campus. Courses at Richmond are centred around traditional trades, with a stable workforce of older staff, who have, at times, felt threatened by the amalgamation.

The Institute has close links with one of the local schools near its Moorabbin campus, the Moorabbin City Secondary College.

This case study covers the review of three META groups:

1. The management group at Richmond campus, which is a group receiving funds through the Office of Training and Further Education (OTFE). This group is the primary focus for the case study.
2. A group of managers in the Business Studies school.
3. A group of managers and teachers at the Moorabbin City Secondary College.

The Institute has been involved in the various development stages of META, including being a case study site and trialing. This trialing included volunteer participants, some of whom have been involved in the Richmond team.

The Director has been active in promoting the Institute's involvement in META, as part of its Strategic Directions in management systems and practices, and management development. He was active in proposing the Richmond group as a funded project.

Each of the three groups has had different reasons for its formation, has progressed in different ways, and achieved different results.

Richmond—META team

With the amalgamation of the Richmond and Moorabbin campuses into the Barton Institute of TAFE, the Deputy Director based at Richmond, proposed a number of initiatives to meet the Institute Strategic Directions, with the aim of the campus becoming a Best Practice Organisation.

One initiative was the formation of several teams to address specific issues. The recommendations flowing from the teams will be implemented through the Richmond Campus Management Team, which was nominated as the group to apply the META scheme. Funding for this team activity was obtained from OTFE.

The managers in charge of various functions at the Richmond campus had changed significantly prior to the formation of the Richmond Management Team. Therefore part of the process was to develop the Management Team in the new environment. One of the primary functions of this team is to implement recommendations flowing from Best Practice working teams covering:

- Management and Morale
- Communication
- Learning Resource Development

Richmond campus is primarily involved in the delivery of training in traditional trades. A significant percentage of the staff have been in this role for all or most of their working lives. In this environment there has been significant pioneering development of competency-based training approaches, using teams in the delivery of training. Thus management is familiar with teams at the operational level.

How META was introduced

Two members of the team had been involved in the initial pilot group, and were familiar with the materials used at that stage. It was expected that they, and others who had management development responsibility, would assist the Adviser in the use of META.

META was introduced to the team starting with considerable time being spent on the first two steps. It was at this stage that a number of the members had difficulty with the process, the project selected and/or speed at which the team was progressing. Others, with less management background, found the time useful.

Typical comments about this time were:

> I felt lost.
>
> I felt frustration – I questioned the project as I felt we did not have a project.
>
> I observed what we were doing and learned.
>
> The size of the documentation was a problem.

Early in the process, the adviser was provided with a number of META Kits, which she distributed to the team members. It was intended that they use the kits to become familiar with the scheme, but it had the impact of confusing and/or overwhelming them. For example, one member said,

> I did not understand the materials, they needed explanation, and later
>
> The steps were complicated and difficult to understand.

Another said:

> The materials are long-winded, but valuable as a tool. They should be used as guidelines when the team gets stuck ….the process should be customised by the experience of experienced advisers.

Some members came to the conclusion that META was a redevelopment of materials available previously. The adviser commented that she would never hand out the full kits to another group.

During this stage there was considerable interaction in the group, as members who had been in the previous group tried to explain the process from their perspective. Also there was an issue of how the team was to be organised and led. There were both positive and negative comments from other members about this.

Several people commented that there seemed to be a reluctance within the group to commit to activities.

On-going Team Progress

The team has completed two cycles of the META process, one as a preliminary learning process, and the second as a working cycle. This has been a lengthy process, and the response of different team members varied according to their background. For some, this was their first experience in management development, and they considered it to be a positive experience.

Other members with management experience and prior management development commented on the length and complexity of the process. These people in individual comments said for example:

> It has provided ideas to form and lead a team, and [has explored] the skills required in a team
>
> the self analysis has been useful … other bits and pieces were learned
>
> I learned more about the people I work with...we are more open to talk to others at the job … it (META) reveals more about the people than I knew previously

All members commented that the process has developed working relationships across the campus and that this has been evident in several other projects and in improved cooperation across departments.

At one point in the process, members were involved in a Myers-Briggs tool. A number of members commented that they found this useful in their development. Another commented that this tool or others such as the Team Management Index should be included in the META scheme.

Towards the end of the process, a two day workshop at Sorrento was organised. Its goal was:

> to foster a team based approach across the institute

and involved the development of competencies:

> Develop visionary and innovative strategies and plans
>
> Review and evaluate team performance

There was universal agreement that the workshop was a positive experience where the members learned and were able to develop their interaction in a positive environment.

The adviser commented that this should have been scheduled towards the beginning of the team activities, rather than at the end.

The team has completed all steps to the preparation of a Management Development Agreement. This has resulted in a planned series of management development activities through to the end of 1996. All team members were included in the management development activities.

Outcomes and assessment of these outcomes have been documented in the Agreement. These had not been completed at the time of the site visit.

Role of Adviser

At the beginning, some members of the team seemed to have different role expectations from those held by the adviser. At first, the adviser also performed the role of team leader. Then the team felt that the leadership role should be separated from the adviser.

This allowed the adviser to change her approach to coaching the leader before the meetings, and to act as a facilitator within the meetings. Later the leadership was rotated between members. Several commented that they learned a lot about the META process before and during the meetings they led.

The leadership role within the team was obviously still a concern as several members commented on it in different ways in interviews. There was obviously some expectation that the adviser should have performed this role. This was not how she saw her role.

The adviser had found the process complex due to a number of factors:

- The campus culture being perceived as a 'traditional TAFE' one with the team expected to provide input to change.
- Lack of a clear vision and goals for the team.
- The rotating and changing team leadership and her role.
- The size (9 people) and diversity of experience of the team.
- The feeling by some that this was, 'the flavour of the month'.
- The expressed need to 'finish META'.

Given the experience of various teams where META has been applied in the Barton Institute contexts, the adviser commented that she would not apply the META process so overtly in another team in the future.

Consistency between organisation culture and META principles

The team commented that the campus has had a 'traditional' management approach prior to the Institute amalgamation. This is attributed to the type of training provided and the culture of a stable workforce.

Yet teams have been operating within a number of departments in the delivery of training, particularly where CBT principles have applied. During a prior visit, it was explained that this was a major and difficult culture shift for the lecturing staff, and there was little classroom instruction and more coaching/mentoring and one on one instruction.

These changes had not affected the management, and the introduction of META as a learning experience has meant some of the management practices within the management team, and within departments, have come under examination. The impact on the campus management culture is not known at this point.

The Barton Institute has since gone through a reorganisation, and the objectives of the reorganisation incorporate some of the lessons learned from META teams.

Type of Team

While this team was structured to provide a management role at the Richmond campus, there were a number of comments about its composition. Comments included:

> 'We were invited to join, but we felt there was no option', and
>
> 'The team has an artificial gender balance' (referring to the inclusion of several female first line supervisors)

Some members referred to their desire to have had more input from the Assistant Director.

Emerging outcomes

After a slow and difficult start, the team has completed the documented META steps and produced a Management Development Agreement, with a series of scheduled management development activities. In addition, the team members have been very positive about the benefits of the activity in terms of working relationships and cooperation as a team, and between team members.

There has been some variation in what individual team members have learned, due to the wide diversity in their backgrounds. Therefore their perceptions of META as a learning process seems to differ with their backgrounds. The people with greater management training and experience have been more critical of the length and complexity of the process, while others have found they learned at each step.

The off-site workshop was considered to be the highlight of all of the activities, as positive progress and conclusions were reached. Whether these conclusions are translated into the workplace could not be determined at the time of the visit.

The extent of active management support seemed to be an issue with some members. It appears the amount of attention given to the META scheme may be related to the perceived management support.

The lack of a project 'owned' solely by the team was discussed by team members and the adviser. The team responded to project material provided by others, and some members found this did not give this team the required direction and goals.

The role of the adviser in terms of leadership and input to the team was perceived to be a significant issue in this team. Also leadership from within the team was an issue.

The adviser believes that META should be applied in a less overt way in the development of future teams. This approach may address the concerns of this team about the length and complexity of the META scheme.

Barton business team

[This summary is based on an interview with the Adviser to the Barton Business Team, and supporting comments by the Institute Director and others.]

The Business Studies Team was formed by four managers in the Business Studies Group who managed four separate centres, one commercial and three teaching, and two senior managers who were involved to provide sponsorship and access to resources. The role of the four managers had been targeted when it was decided to amalgamate the four centres. It was felt the managers should have the opportunity to develop their roles in a team environment.

The four centres had operated independently, each with their own cultures. META was selected as a vehicle to develop the new team and to provide a framework for management development.

Consistency between organisation culture and META principles

The overall Institute direction is to encourage the implementation of a team style of management throughout all departments, and consideration of META. In this case, there were four strongly independent groups being brought together to deliver services in both commercial and non-commercial settings.

The commercial centre had built up a strong management style around its commercial emphasis, and had been successful commercially. There was opposition to changing this framework.

In this restructuring, META was used as a tool for developing a revised organisation culture, starting at the most senior level.

How META was introduced

META was introduced into an environment not specifically covered in the documentation. In fact, there was some time before the members agreed to arrangements for sponsorship and committed to a process. META was known to the participants through the previous case study and trials. The adviser to this group had been a participant in one of the previous groups.

In the early meetings, the adviser followed the META steps and shells closely. During this time the team was still addressing issues related to the restructuring and their individual roles. The adviser found the introductory proformas useful starting points for the group.

The team took considerable time in its development, meeting fortnightly with eight meetings of 2 ½ hours and three meetings of a full day.

Later, it was realised that the full process was going to be too long and frustrating for all concerned and the META materials were used as a guide to the process to be followed. At this stage the team directions were evolving in a positive way. The adviser changed her role to responding to the needs of the team.

The team developed a genuine team management structure, where the members agreed to have combined goals, joint responsibilities and decision making, including joint management of staff and measurement of the team via the performance appraisal process. This was a radical departure from the Institute organisation structure.

This approach has had a number of consequences:

- The team needed to go public to explain itself.
- Subordinates needed to be provided with guidelines on how this new structure would operate.
- Other departments did not know whom to contact in the management team.
- The individuals in the team partially specialised in some management functions to provide the primary contact for subordinates and others.

The competencies included in the META package were only used as a guide, as the adviser felt these were out of date for the team and VET environment.

Role of Adviser

As the adviser and the two senior managers were involved in assisting the team formation, she was directive in her early approach. While META provided materials, she commented that significant facilitation skills were needed in this environment.

As the team formed and increasingly set its own direction, the adviser became less directive and towards the end of the process was 'at the mercy of the group'.

During the process, the adviser organised for the participants to complete a written evaluation sheet on a regular basis. This provided information on the individual and team progress.

From her experience, the adviser has developed a model where the competencies for the team and individuals can come from any source and the competencies are not rigidly applied to the team performance plan. The model is designed for the team and individuals to progress against both the plan and competencies.

Type of Team

This team has been formed under circumstances of strong external pressure, where the members were required to develop a management style and organisational culture in response to reorganisation imposed on them. The members, as part of a Business

Studies Department, had exposure to management developments nationally and internationally.

It appears the team took some time to develop its structure and direction, but when the framework was agreed, the implementation occurred quickly. The radical nature of the team structure in the Institute management has forced the team to explain its concepts and method of operation to the remainder of the Institute.

Emerging Outcomes

The following outcomes have been identified:

- A team performance plan has been completed with combined goals and direction, and used as a basis for performance appraisal.
- The team, in order to effect its decisions, needed to go public and explain its operation to the other Institute staff. This has presented them with a different method of management, and challenges some of the Institute norms.
- The original target of combining the four separate centres into one has been achieved.

This team has now changed under a management restructure implemented across the Institute in early 1997, but some of the principles developed by the team have been adapted for use in all business units. This includes the amalgamation of commercial and recurrent activities.

Moorabbin City Secondary College

The Barton Institute is represented on the Moorabbin City Secondary College Council with the aim of developing better links between the two institutions. It was through this link that the senior management of the College became aware of META. [This summary is based on comments made by the College META Adviser, and Barton personnel.]

Background to Introduction of META

The College management group referred the possible use of META to the College Council, as a tool for developing the method or process for preparing the next College Charter. This Charter includes the components of a three year development plan. It is a government requirement that the College (as with other secondary schools) have this Charter. The current College Charter has one year to run, and many of the components of the current Charter have been met.

The College Council endorsed the use of META, and the group has been operating since April 1995.

The use of META was seen as professional development for the senior staff in the College, as well as completing a small project within the time constraints imposed on the staff. Other staff have joined the group as volunteers.

Role of Adviser

The adviser within the College, Bryan Ridgeway, has not attended the adviser training, but has worked from the written materials with assistance from the trained advisers at Barton Institute. He has prior training in management and organisation theory, and considerable experience as a senior staff member. He has been seen as leading and coordinating the META process and the project to revise the Charter.

He initially worked through the materials as an individual, and had little difficulty in determining his approach. He has had to modify the materials to remove the VET emphasis. While many of the shells were followed closely, some sections of the materials were not used in the process.

One major issue to be addressed was the linking of an appropriate sized project to the META activities, due to the limited time the members had available. The revision of the Charter was chosen for its strategic nature and the long lead time before it was to be completed. The group has been enthusiastic and as at November 1996 had met about 10 times for sessions of about 2 hours.

Bryan felt the external assistance provided by Barton Institute has been important in ensuring the group has not drifted from its goals. The Barton personnel have acted as facilitators and critical friends to assist the team processes.

No formal evaluation has been done by the group, although Bryan has reviewed the progress of the group through conversations with individual members after the meetings, and represented the team in an evaluation with Barton staff at the end of the META process.

Type of Team

Although the team is project-based and includes volunteers, it has been able to work together very quickly. This was explained by the small size of the College, with 35 to 40 staff who work with each other on a day-to-day basis.

The Process

The team progressed through the 'Getting Ready' stage rapidly, and then addressed use of the competencies. This has allowed the staff to reflect on the competencies as a basis for learning and to evaluate themselves against the statements. This experience has been positive. Included in this stage and the Performance Plan is the use of a 'critical friend', who is generally external to the organisation, to provide additional feedback.

The group is moving to implementing the Performance Plan in late 1996 and sees the META process as a different form of professional development. Individuals have commented positively on the difference.

It is expected that the Management Development in 1997 will incorporate a coaching/mentoring approach to professional development, with the group doing the development together.

Emerging Outcomes

The following comments were made on current and expected outcomes:

- The staff have found the process a positive professional development experience and quite different to teaching. They have been exposed to strategic planning concepts and competency based learning.
- Groundwork for the next Charter has been completed.
- Links with Barton Institute have been strengthened.
- The competencies could be used in describing requirements for senior positions and will assist in the advertising and filling of those positions.
- The Management Development Agreement is seen as an important step, leading to joint management development activities.

The time the staff have spent on the META activities has been considerable, but they are positive about it.

Conclusion—all teams

The study of the three teams shows the diversity of applications to which the META scheme is being applied. Each of the three teams has started at different points and is concluding at different points in terms of:

- Team development and cooperation
- Competencies of the individual member and the teams.

Each application has served different purposes and had different results. The Barton Business Team has had influence across the whole Institute.

Case study

CENTRAL WEST COMMUNITY COLLEGE
BATHURST, NEW SOUTH WALES

Introduction

The Central West Community College, based in Bathurst, and serving a wide area around the city, is an independent non-profit adult and community education provider. It is reported as the largest regional adult and community education provider in New South Wales. The College has been involved in the development of META in a number of ways:

- participated in the Adult and Community Education focus group;
- included as one of the case studies in the META kit (Appendices pages 10 to 14); and
- assisted in piloting of META.

It had small beginnings in 1980 with Hazel Smith, the Principal, as the only employee, and has experienced a number of years of rapid growth. In 1996, it delivered programs in 30 regional locations and maintained offices in 14 towns, some with more than one location.

In recent times, with the changes announced in the 1996 budget, the College has had to curtail some programs affected by budget reductions. It has developed strategic and innovative approaches to its changing environment, enabling it to maintain key resources to ensure it meets client and customer requirements over the longer term. As one person said:

> This Federal Budget was the most significant factor shaping the College's future in its 16 year history.

The Appendix of the META Kit refers to the College Management Team reviewing the requirement for a formal performance appraisal system. This has been put aside while the team addresses other organisational issues, including planning and marketing, and reorganisation to maintain old programs and to develop new ones. This change in emphasis has coincided with the need to develop approaches to manage the large-scale changes the College was experiencing.

College Management Culture

The management team culture was deliberately developed by the original management under the leadership of Hazel Smith, in response to rapid growth and the need to operate in a number of locations. In some years, the growth has been 100 percent. The management realised they needed to work together to strengthen management experience. Comments made by the team and others included:

> The amount the organisation does achieve is related to the output of the management team, which is greater than the sum of the individuals.
>
> This College is the largest ACE [Adult and Community Education] provider in NSW ... there is nothing special about the area, it is the people and the management team in the organisation.

This team culture has developed and continued through the years due to the strong commitment by the senior management. The management generally expresses and demonstrates a belief in the team approach to management. This approach also assists in the effective management of the many locations, where the isolation of staff and managers is addressed.

In addition to the College Board, there are two main College management forums, the College Executive and the College Management Team. A large portion of the College planning and corporate issues are dealt with at the Management Team level, including the development of organisational structures and the annual budgets.

At least half of the managers have come into their management roles in the College without prior management experience. Typical career pathways have been to start work with the College on a part-time basis, often as an instructor, then progress to full time, and later to a management role. The managers believe that the overall team can assist each individual manager to overcome lack of experience and skills. The managers have a genuine desire to learn, and the way the team learns together and from each other was openly discussed.

They gave two examples of the team supporting each other:

1 There was a realisation that the College's strategic planning methods needed to be improved. No one manager felt competent to lead the process, so they set out to learn by one or two managers researching, by seeking external assistance for limited duration as a learning experience, and by completing the planning process and evaluating the results. One comment made was:

> The first strategic plan was important in defining the style of organisation we are. Subsequent planning has become more sophisticated.

The College has not sought external assistance since the first plan.

2 The team had to manage a human resource issue, involving some retrenchments. One of the management group had previous experience in this type of issue, and

> her experience and knowledge became the basis for the team working through the issues and developing appropriate approaches.
>
> This process assisted other managers to improve their skills in human resource management.

The concept of the individual manager having a wider responsibility to the management team was raised as an interesting aspect of the management culture. This certainly leads to support for each other and increased self confidence. One manager said:

> The team approach to management is excellent... we can second guess other managers' thinking and responses, and commit the College to delivery with confidence.

This team culture and learning style does not seem to deflect from the organisation goals (see later discussion). Several times managers referred to learning in the context of 'real work' or 'learning as the job is done'. They referred to the use of META this context as well.

The use of META has been written into the College's strategic plan.

The Management Team

The style of management team can best be illustrated by the evaluator's introduction to the team. The team normally works across several sites in different country towns, but had travelled to Bathurst to participate in the evaluation and to conduct other College business.

After a short introduction, the session was opened for comment by the team. There was a pause, then one of the members broke the ice with a short quip. There was immediate response and support from the others.

There was a high energy level and interaction between members as they described their experiences jointly, with a number of the members contributing. The themes were picked up by others as each made their point. During this discussion, the Principal, Hazel and other senior staff members were no more vocal than the others. In fact Hazel was one of the quieter members, and her contributions were mainly in the form of linking and consolidating the conversations.

The discussions ranged freely over 'technical' issues, as well as the 'touchy-feely' areas' (as a manager put it later, meaning demonstration of support and empathy between the managers). Individual and group responses to management of the college in expansion and contraction modes, as well as development and changes to program planning and delivery were reviewed.

This is obviously a team that has worked solidly on understanding, supporting and developing each other. They explained their approach this way:

> Skill development of management is the result of business development.

and a development of attitude from being a program manager (i.e. with a total focus on the delivery of one or more educational programs) to:

> What are the requirements to run this business.

Other points made by the team about itself included:

- The leadership and culture of the College does not reside in one person.

  For example, a recent decision (October 1996) was made by the College Executive to respond to a crisis. There was some feeling by management team members not on the Executive that this had contravened the College management style. Members of the Executive recognised that their need to make quick decisions in a crisis had to be clarified and articulated to the Management Team.

- The bona fides of each member and the team needs to be articulated and followed through in action.

- There needs to be a shared understanding of what has happened in the College and how it is to go forward.

- The different learning styles of individuals in the team need to be accommodated.

  There was considerable emphasis placed on this, as it had obviously been an issue previously. The team has not used separate professional development approaches for individuals, as it has concentrated on the team learning as a team.

  An important feature underpinning the team and its learning is the concept of a learning organisation. The management indicated this has been important in not only establishing the management team approach, but also for the managers in establishing teams in their own areas and programs.

  Included in this was the process of 'modelling', i.e. to throw ideas on the table for review, and to evaluate the quality of decisions in the light of hindsight to determine what lessons can be learned.

  Several managers stated that they had formed teams in their own departments and programs based on their experiences in the management team and used META as a reference tool to decide what alternative approaches may need to be used.

- New management members have been selected on the basis of what they could add to the management team, as well as their individual skills.

  In this way, there has been a conscious aim of getting a complementary blend of skills in recruiting. This raised the issue of inducting the new members into the team.

  The team acknowledged that it could improve in this area of manager induction. This was later re-affirmed in individual interviews. They said it is important for the team to be inclusive of the new member and to adjust to the new person's learning style.

- They also said 'historic stuff' about the team, how it was formed, its processes and what it has done is important to the team. It explains part of the team behaviour and needs to be communicated to new members.

One person described the development of the team as the organisation grew 'from being purely operational to now being a team capable of working through conceptual, transformational and operational issues'. This was said to illustrate the development of the College's corporate culture.

College Introduction to META

As indicated above, the College has been involved in providing input to the development of the META system, through work on reference groups and being a site for review and piloting of concepts. Hazel had kept in contact with the project manager and consultants during the development of META.

Two of the managers attended the META launch in Sydney and became interested in using the materials within the management team. As one put it:

> We are living the team approach, and it (META) fits our management style.

The College applied for, and received funding under the META pilot scheme. Hazel and Suellen Young attended the adviser training in Sydney. They have worked jointly in managing META processes, as well as other professional development. Some of the funds received have been used to visit other organisations to explore the application of teams and the META system.

In introducing META to the management team, they decided to blend the approach and tools (shells) into the day-to-day operations and meetings of the management team. As they put it,

> There was an integration of META into the normal processes. META informed and helped in these processes.

The shells have been used sparingly, and then with modifications. One made the comment:

> The shells are better for newly formed teams. We have used the shells as ideas on how to move forward.

Hazel and Suellen have seen META as part of the action learning process within the management team. Therefore it has been embedded into the overall staff development.

Application of META

When the question was asked of the management 'How have you used META?', one of the managers replied, 'What is META? Can you explain where it starts and finishes?'

The team then explained that they had not set out to 'use the META process'. Therefore the managers had difficulty in providing answers to some questions put to them. However they made the following points from their experience of META:

- The chief executive and senior managers need to be prepared to assume the values in META if it is to be used successfully in an organisation. They must have a belief in the democratic style of management and the leadership patterns implicit in META.
- It was hard to divorce Hazel's role as leader of the management team, and as facilitator in META. There was a problem with maintaining objectivity in the process. However, the team is not locked into META, and at times needed to put META aside for a while to address other management requirements.
- The advisers found the materials and process cumbersome. They need all of the materials on disk (or on-line) if customisation is to be efficient.
- Other teams have been promoted by managers in their own department. They have used META as a reference, drawing on different aspects relevant to this team. For example, a group of literacy program facilitators was assisted in their role of managing people by the use of some META materials.
- The team wishes to use the competencies contained in META, but found them not reflecting the work done in the College. However, they have used them as a general reference.

  There was a discussion about this, and how to find other competencies or what approach should be used to customise the competencies. The College was seeking advice and material about customising competencies in addition to the META Kit.

- The managers were comfortable with the way META had been used in conjunction with other professional development materials and approaches.

  They reached this consensus after discussing the professional development program. At times they were aware that they were using a META process, but generally they were not aware when the advisers were introducing the META process, shell or concept. In some cases the advisers have modified the META materials to suit the managers requirements.

- During the evaluation, the managers stated that they felt it was the time for them to do their own review of the META materials, and especially to assist managers understand its scope, and the resources available.

What has been achieved?

The following benefits were identified by the team:

1 META has been a valuable reference tool for the management team to understand its operation and its performance. As stated:

> META has been an excellent tool when things have been going bad (for the College and managers). For example, when the Federal changes were announced, the team experienced a lot of tension and it assisted in addressing this in a healthy way.
>
> META has been a good mental model for strategic planning.
>
> META has pinpointed areas of weakness (in the management team approach).

2 META has been used as the framework for developing a team style of organisation through the College.

3 META has assisted in the management development at team and individual levels.

Some of the steps, for example, the Management Development Agreement, do not seem to fit the corporate culture of the organisation. This does seem to have reduced the value of the kit in the eyes of the advisers.

4 The members have identified changes in the in the operation of management meetings as a result of the application of META.

The use of META has not been cheap. Two types of cost have been identified:

1 Direct costs, estimated to be about $4000. This includes some travel to other organisations and cities to research and develop approaches to use META.

2 Costs of meeting more frequently, estimated to be $18 000 in time.

In addition, there are concrete outcomes that can be identified. The meetings with the managers occurred immediately after major corporate changes, including the curtailment and changes to a number of program areas. It could be expected that the morale of the managers would be low, and they may have dwelt on the significant changes of the immediate past. It was clear that the time period had been traumatic to some, but there was acknowledgment that the team had supported the individuals. The morale was high, and the managers were actively planning for the future.

This means the organisation will recover more quickly in performance and financial terms, and the College, its clients and the community will benefit.

Issues confronting the college management

The College has a good model of a management team, which appears to be managing the College well. However, members of the team did point out issues that they need to address:

1. They need to maintain the team while formalising some parts of the operations to improve them.
2. There needs to be improved ways to incorporate new managers in the team, and to accommodate their learning styles.
3. They need to improve the organisation's ability to manage change.

Pointers from the study

The College Management Team is highly effective and can point to the management of a geographically and operationally diverse organisation in times of rapid change. The Team has developed its own style and culture.

Key aspects in using META that should be noted were:

1. Components of the META system were included naturally into the operation of the Management Team, to assist in the management of specific issues as they occurred.
2. META was used seamlessly with other management techniques and was customised by the advisers. The management philosophy espoused in META has close correlation with the College's philosophy, and its use was natural.
3. Not all aspects of the five steps have been used, but significant benefits have been identified through the use of META in the Team. The parts of the kit have been used as required, without regard to the sequence provided in the kit.

4. Effective operation of management teams is an ongoing challenge, involving the 'refreshing' of the teams over time and as new members are included.

5. The College would have appreciated some additional material, and the on-line/disk version to assist in customisation.

6. The costs of using META are high, but the College has received significant benefits from it.

Case study

DOUGLAS MAWSON INSTITUTE OF TAFE
ADELAIDE

Background

The Douglas Mawson Institute of TAFE is a well recognised TAFE training provider, operating from two campuses in the southern suburbs of Adelaide. It was formed three years ago through the amalgamation of the Panorama and Marleston Colleges of TAFE.

Both Colleges have operated separately for two to three decades from their establishment. The Marleston Campus has operated in the areas of building and construction, furniture, textiles, clothing and footwear, and wool and supporting training functions. The Timber and Furniture Industries Technology Institute operates from within the grounds of the campus, maintaining close links with these industries.

The Panorama Campus operates in areas of business services, real estate, occupational health and safety, engineering, quality, office and computing studies, community services, adult and community education and vocational preparation. Managers commented that Panorama has a 'white collar focus'

The separation of the campuses is seen as an important characteristic of the Institute culture. Comments made included:

> The Institute has had a two campus orientation.
>
> We work as two separate campuses.
>
> We have had a different style of management since the amalgamation (of the two Colleges).

Mike Muhvihill, the Director of the Institute, had been involved with the development of META through the State Committee of the National Staff Development Committee (NSDC). He was interest in continuing this involvement and encouraged the submission for funding. This funding has been applied to supporting the use of META with the Institute's senior management.

Management structure

Most senior staff and managers are based at one or other campus, with a few staff in the corporate and senior management areas working across both. The Institute is now to be involved in an alliance with the Western Adelaide Institute, with the Douglas Mawson's Director, Mike Muhvihill, moving to Western Adelaide, and a new person becoming Director of Douglas Mawson.

Over time several natural groups within the management team have developed. The educational managers at both campuses have met regularly to address campus-specific educational issues. The corporate services group operates across both campuses and its sectional and departmental managers have met on a regular basis. The Institute Executive is drawn from senior managers at both campuses.

Reasons for introducing META

The need to draw all senior managers into a common Institute focus and culture resulted in the formation of an Institute Management Group. The outcomes sought for the Group in the use of META included:

> A shared educational vision; development of management competencies; development of a learning organisation; META integrated into planning processes; and cross fertilisation across the Institute.

META was seen as complementary to the Institute's initiatives in the development of flexible delivery, information technology, leadership in management systems and quality management systems.

The Organisation

Douglas Mawson Institute has an organisation structure which appears to be evolving from a traditional structure of a large VET organisation. The number of people in the various management levels has been reduced significantly, and the number of sectional workgroups has been reduced. The managers themselves commented extensively on their changing workload, some considering that there was reduced opportunity to do their jobs adequately, and others accepting the new challenges more philosophically.

The reduced staffing has forced the remaining managers to develop alternative operating methods and to experiment with the delegation of work and authority to individuals and groups of teaching staff. Comments made during the interviews indicate that some managers are more satisfied than others with the results from this approach.

The Institute has significantly improved its productivity over the past two years. There is some disagreement between managers as to how far this can continue. Performance management is a major issue for some managers, especially in light of the requirement to obtain additional productivity gains. Other managers did not state this was a major concern in the interviews, but it may be, given the work completed by the management group.

The management structure has been changing during the time the management group has been using the META system, and this has added another dimension of complexity.

Historically the facilities, training delivery and management of training have been along industry lines, with limited cooperation between departments. Some courses have required delivery across two or more departments, necessitating cooperation. Managers indicated in the evaluation interviews that they have had limited contact with many of their peers.

Application of META

One of the key goals for the use of META in the Institute was the development of team-based management processes from the top levels of management down. Some teams have been operating within departments in the organisation and delivery of training. Therefore the concept of teams was familiar to the Institute.

The Executive decided to call for expressions of interest from within the Institute staff to act as adviser to the META team. A decision was made to employ two people (each at 0.2) who came with different strengths.

Early activities concentrated on team building, and included one and half days at a Victor Harbor conference centre. The first day of this session has been reported as 'enjoyable' and 'worthwhile'. Some members found difficulty with some of the META processes, which were introduced in the last half day, such as the Team Performance Plan and the selection of a team project. Output from the session included personal goals such as:

1 Widen more accepting TEAM approach.
2 Help to combine two campuses.
3 De-jargonise the process.
4 Cementing.
5 More relaxed with the team.
6 Enhanced trust and motivation.
7 Harmony appreciation understanding.

Progress in later meetings was slow. The group members stated that they found the processes and goals in meetings unclear. At this stage, the advisers were allowing the Management Group to set its own pace. Later some members expressed frustration at this approach, and asked the advisers to take a more proactive role. The advisers mixed activities based on the META Kit with the development of a Performance Management Policy.

The Performance Management Project

This project was selected by the group from several alternatives as one that met the Institute's goals and was of manageable size. The process of developing the policy has been drawn out, and has not reached the stage of trialing in various Institute areas as intended.

In order that the project be completed in a reasonable time, one adviser has concentrated on aspects of the process, and the other on the completion of the task. Some reported that at times they were confused between what was META and what was their Performance Management project because the processes of the two are similar.

While the advisers attempted to link the activity to the individual and team competencies, the group has not reached the point of applying them. The view was expressed that the group had confined its activities to the initial META steps, and not addressed the individual and team competencies. Some members stated that they would benefit from working through these steps, although others believed the task had been completed.

Themes from Interviews

- **Using META with a newly established team**

  It has been acknowledged in the interviews that in this case the META system has been used as the framework for team building and development. Comments were received such as, 'fabulous tools for team building'. The developers, however, have not claimed that META is designed to be a team building system, although recognising that some team building may need to take place.

  The advisers felt that considerable time needed to be spent in team building activities, to overcome the campus and departmental divisions. Similar to advisers in other META activities, they used additional standard team building tools.

  This may deflect the team from the objectives of the META system, and take more time to complete its task. The adviser's role appears to be more complex when working with a new team, as issues of leadership and team roles became important factors in the team's success.

- **Size of team**

  At sixteen, the Institute's team is larger than most which have used META. This group has divided into subgroups for some activities. At another time, members looked at the performance management policy in terms of implementing it in their own departments. This has made the processes used more complex.

  In addition, there were difficulties because members did not know all other members well. Some activities involved members recording their perceptions of each other. Some members did not consider these activity results to be valid because there was little contact with members in another work area of campus. One member did not fully participate for this reason.

The size of the team and its recent formation meant members had to spend considerable time understanding each other. This time has been valuable, and has been acknowledged by members as important though frustrating.

- **Team development**

  Overcoming the above barriers has meant members now feel comfortable to discuss issues with others they did not know previously. This has led to improved cooperation between departments. This improved cooperation has been acknowledged in individual interviews and in group discussions.

  Others still feel this group is not a team. This issue was raised in a number of interviews, as some feel stronger ties with their campus or functional management teams. However, others stated strongly that they could see team development which has enhanced the management of the Institute.

- **The adviser position**

  The Institute selected its team advisers through a formal advertisement and interview process. Two advisers were appointed for the Group.

  The advisers worked out their roles with each other and with the manager sponsoring the META activity, as well as with the group. The advisers met regularly to ensure coordination of their approaches. The different styles of the advisers has been noted by the team members as reflecting an apparent inconsistency in orientation and approach.

  In a meeting with the group, the advisers commented on the need for clarity in their role. One commented that an overview of the META process should have been given at the start, so that the advisers' roles could be clarified. There was confirmation of this point from other group members.

  The two advisers have different preferred facilitation styles. The advisers have reported that their training encouraged them not to lead in the META processes and related tasks. Some members of this team have looked for this leadership from the advisers, giving rise to group tension. At other times, some did not want the extent of leadership provided.

- **Selection of project**

  The Performance Management project selected by this group was a policy development and documentation task. It was an area of management which is promoted strongly by some of the managers, and the Institute had been grappling with the introduction of Performance Management for some time.

  Other managers saw other Institute issues as more pressing, and have not thoroughly identified with the project. They have indicated the project outcomes in terms of Performance Management as useful.

At times, there was confusion between the task and related META processes, because the concepts in both are similar.

Given the factors mentioned above, the selection of an activity that meets one or more priority strategic goals of the organisation and the individual members is required to maintain the interest of the members. Each member naturally asks, 'What is in this for me?'.

The members believe that they have learned more about Performance Management during the development of the policy. They indicated this was one of the Management Group achievements.

- **The META competencies**

In this project at this stage, individual and team competencies have been briefly looked at, with little formal identification of the team and individual competencies addressed by the project tasks.

Some have expressed reluctance in proceeding to the competencies. This may be due to confusion between assessment as part of competency-based development, and appraisal as part of performance management. Another view proposed is that some feel threatened as long-standing managers, and the team development has yet to progress to feeling comfortable in being involved in peer review and coaching.

One suggested that the META approach to competencies was too idealistic. The Tom Peter's approach of identifying what can be added to the manager's CV from the activity was suggested as an alternative. This was tested on the group, who felt that some members and the advisers would be able to refer in their CVs to the work on Performance Management either now or later when it had been applied.

Others have felt they have not explored the benefits of working with the competencies sufficiently. Some members felt that there was confusion in the application of team and individual competencies, and where each fitted in a person's competency profile.

- **Changes in management group**

As with other sites, there have been several changes in the membership of the Management Group. The new members have found difficulty in fitting into the group. No special steps to induct these members were reported.

Changes in the membership of a team could provide an opportunity for the group to check its progress, refresh interaction, and to evaluate results in conjunction with the new members.

Although the new members had difficulty orienting to the task and the processes, they could clearly see where greater cooperation had been achieved and that progress had been made. Their comments have been useful in the evaluation, and should encourage the other team members.

Summary

The use of META by this group has produced clear benefits for the Douglas Mawson Institute. The Management Group can point to:

- development of a policy which had not been agreed to previously;
- increased understanding of Performance Management concepts and processes;
- additional communication channels which have been developed, resulting in small groups of managers working cooperatively on development of the Institute. One project required the commitment of funds from several departmental budget lines to achieve a common goal; and
- in other cases, managers feeling able to raise outstanding issues and propose new initiatives in other Institute forums because they have worked with the other managers in the META scheme.

Case study

HOBART INSTITUTE OF TAFE
THE HOBART INSTITUTE

The Hobart Institute of TAFE had almost 10 000 accredited course enrolments in 1995, a total of 895 part-time and full-time employees and a budget of $16 million from State and Commonwealth funds. It operates from the Campbell St and Clarence Campuses, Hobart. An overview of the Institute is available on the Internet [home page on the World Wide Web – address www.dirvet.tas.gov.au/HIT/]

Changing the culture of an organisation

The Hobart Institute of TAFE had 'taken a battering' during the early nineties in relation to rationalisation of courses and reduction in finances. Morale was very low. The Institute was considered to be quite hierarchical in its structure and operation. It was recognised that if there were to be a change in the culture of the organisation, there would be a need for highly skilled managers actively contributing towards this change.

The National Management Development Scheme, a project that preceded META, was seen as a possible way of moving the Institute away from a hierarchical type of management towards more of a teams approach. In 1994 the Hobart Institute of TAFE became one of eight national case studies focussing on different management development projects. The Hobart team consisted of four associate directors and two managers. John Francis was funded by the National Staff Development Committee to manage the team project. The major project and the topic of the related case study undertaken by the Hobart Institute was the development of a strategic plan. This was chosen as at that time no strategic plan existed.

It was from the National Management Development Scheme that the national META program developed. The Hobart Institute of TAFE was selected to be one of the funded META sites.

An Institute Management Group had been established, consisting of the associate directors, with moves towards increasing devolution of responsibility, accountability and decision-making. META provided opportunities to not only strengthen this process at the senior management level, but also to develop it throughout the organisation. Many managers had been in this role for over twenty years and were accustomed to a hierarchical structure. META would offer possibilities for a quite different way of operating.

Support for the META project

The Hobart Institute was a funded site for META. The Institute was already familiar with underlying META concepts through its development work as one of the earlier eight national case study sites. The support from the Director was strong. Involvement in the previous project had already proven beneficial to the organisation and the direction of META suited the Institute. The Director, John Upson, believes that high level support is critical:

> There is no point in putting any manager through this process unless the senior management is prepared to support the process.

The Hobart Institute considered that the role of META Coordinator would be pivotal in the development of META if the approach was to be adopted throughout the organisation. The Institute sought and obtained funding from the State additional to the Commonwealth grant. The Institute also contributed funds towards META, enabling the appointment of a full-time coordinator. The Institute is unique in having a full-time META coordinator.

A further reason for investing heavily in META is the potential that it offers for subsequent development services that the Institute may make available to other organisations.

History of involvement in innovative research programs

The Institute has a history of involvement in the development of major national professional development projects. As noted, these include the National Management Development Scheme which culminated in META. Another was the Work Based Learning in Action Scheme (refer to the kit, Action Learning in Vocational Education and Training). It is not surprising that an application was made to become a site funded for the META program.

Facilitation

The high priority that the Institute placed on facilitation of META is shown by the appointment of the full-time facilitator. This was considered important because the plan was to introduce META to all levels of the Institute, including service staff. For example, it would be expected that cleaners and caretakers who normally work independently of each other and who had no previous management training would need considerable guidance and facilitation in the new team-oriented process.

Implementing META

After the National Management Development Scheme finished the development stage of the META program, the Institute decided to continue with their own initiatives. A

Management Development Task Force was established to act as a reference group for META within the Institute. The Task Force developed a position description for a META adviser which was submitted to the agency and ultimately approved. The position was advertised and Pauline Camm was appointed. In all, this process took about nine months.

A newsletter informing staff about META and inviting expressions of interest was personally addressed by the adviser to all staff. The adviser then went through each area of the Institute giving presentations and extending invitations to become involved in the scheme. The overall plan, endorsed by the Director and the Reference Group was to involve three stages: (1) awareness raising (2) getting started (3) evaluation. The intention was to get a critical mass of interested people early in the piece. Further down the track the intention was to more deliberately target middle management with a view to forming cross-functional, cross-departmental teams, which were seen to be an element in organisational change.

Six META teams were identified [listed as follows in October, 1996]:

- the Institute Management Group, consisting of 2 Associate Directors Administration, 8 Associate Directors, Programs, an Executive Assistant.
- a work unit team from Engineering Services– Fitting and Machining, consisting of one program manager, seven teachers, one senior technical assistant, one apprentice and one storeman/cleaner.
- student services unit, consisting of one program manager, one career counsellor, one multi-cultural coordinator, one learning support officer and two counsellors.
- a work unit from Building Services – Carpentry and Joinery, consisting of one program manager, and seven teachers.
- business manager and team leaders in the administration area, consisting of finance and accounts, personnel, student administration, facilities, and senior clerk, administration
- combined work unit team in the Engineering Services area – Electrical and Refrigeration, consisting of two program managers and nine teachers.

Most of the above are operational teams. The progress of individual teams in defining their project topic and moving through the META stages has varied considerably. There have been unfortunate delays in the appointment of advisers and breaks in continuity owing to the original adviser taking up another position after a relatively short period. This factor will be discussed later.

Some process issues

- **Team Building**

Before commencing her position as adviser at the Institute, Pauline Camm contacted her colleagues elsewhere in Australia to find out what their experiences had been in the introduction of META. She commented:

> The thing that was coming through to me was that obviously META was time-consuming – and it is. But people were also saying that they encountered some difficulties further down the track, that they hadn't put enough time into team building … and so I deliberately slowed the process a bit to get that up and going – to feed that into the META process. Now that has met with pretty good success with some, and others I've had to modify it a bit…

It would appear that there was considerable variation between the groups in terms of their readiness to see themselves as a team and to function as a team. A member of one group commented that the concept of participating in decision-making rather than following instructions was alien to some teachers who had been in TAFE for many years and this was not necessarily desired. There seemed to be a feeling in this group that it 'took too long to get down to the nitty-gritty'.

The amount of time that is devoted to team-building early in the META program will obviously depend upon the nature of the group. If too much time is spent on it, high levels of frustration may be experienced by those who simply want to get on with the task. If it is neglected when the group is obviously not likely to operate as a team, the project may have a short life.

- **Team Roles and Leadership**

It seems that more than one team came up against the issue of leadership, experiencing varying degrees of frustration at the slow rate of progress. The adviser always considered her role to be that of facilitator and not leader. The aim was for the group to become self-sufficient. In discussing the stage at which the groups were at the time when she moved to another position outside the Institute, she considered that most of the teams were reasonably self sufficient. In terms of their self-sufficiency she commented:

> I didn't feel ever that I should own the project.

In one of the teams, apparent lack of leadership became a major issue, generating considerable frustration:

> It's probably a bit contradictory I suppose, but you've got to have somebody to take the initiative and run with it. I don't think there was anybody in our particular group who was willing to do that.

The Director, John Upson, on talking about META within the Institute Management Team, gave an insight into how someone in a recognised leadership role within the Institute may make a deliberate effort not to hinder team processes:

> (In relation to my role) I sit back and I contribute … but if they start to get in a hole, I'm the last person to try to get them out, because I don't want them to see me as sitting here as a director and not part of the team. And that's something that has to be watched.

- **Understandings and Expectations of META**

In a large organisation and with a variety of teams it is not surprising that individuals may have different expectations of META. As the process continues and as the continuity of facilitation is restored with the appointment of a new facilitator, it is probable that a more common understanding and set of expectations will emerge. In at least one team there was an initial suspicion of META and what it may involve, including the feeling that it could mean more work.

Over time a greater understanding developed and people who had hung back became involved. It appears that there are some staff who are not completely clear on what META can and cannot not be expected to offer within the Institution. One viewpoint expressed was that of frustration that a functional unit was being encouraged to adopt a team approach and to involve itself in decision-making but was not enabled to act on the decision:

> We've come up with a decision but can't act on it. They haven't empowered us to.

The matter related to the blocking out of time to work on a project and had funding implications. It would seem that within the State system there are limitations on what can in fact be delegated to various levels of the organisation and that team recognition of these constraints in forming their expectations can be a real issue.

It should be noted that the induction into META and ongoing facilitation was interrupted by the loss of the facilitator. There was a gap of almost two months before the appointment of the new facilitator, during which time progress of teams in becoming more familiar with META was generally slow.

- **Selection of Projects**

Possibly as a result of time spent in team-building and delays in appointment of META coordinators, the process of determining project topics has been protracted. The teams have had the responsibility for making their own decisions on topics. The facilitator made a point of not attending the meeting at which one group decided its project topic, presumably so that the decision would clearly be that of the group and that there would be team ownership. At that particular meeting a number of suggestions were received and prioritised, with apparently about 70 percent in favour of the topic finally settled upon. One member expressed concern about the wide scope of the project, feeling that a more manageable task should have been selected. The group is awaiting the commencement of duty of the new facilitator before continuing.

The director had little input into the topics chosen by particular teams. His general guideline in discussion with the facilitator was that the topics decided on should not be too theoretical:

> There is so much that needs to be done. Don't let them waste their time. Let it be something that they can use at the end of the day.

Some examples of projects are:

- **The Institute Management Group:**

  To develop a guide for the assessment of customer satisfaction, that identifies suitable processes for use by any department of the Institute.

- A work unit team from Engineering Services – Fitting and Machining:

  The project in principle has been selected and relates to the development of a plan to increase student contact hours by increasing student numbers.

- **Student Services Unit:**

  To develop a range of student profiles which maps progress in the Institute, in order to determine:

  * points at which Student Services can or could have enhanced student progress;
  * ways of making Student Services more client orientated; and
  * ways of promoting Student Services to students.

- **Business Manager and Team Leaders in the Administration Area:**

  The project identified by the team focuses on two areas which can be linked: An OH&S review and the development and implementation of a staff development program for the administration area.

- **Applying the META Model**

  As indicated, delay in the appointment of META advisers and the gap during which there was no adviser have generally slowed the momentum of the META program. Now that the new adviser has commenced duty it is expected that there will be a resumption of activity in most groups (with at least one group keeping its options open at this stage). No group has proceeded through the complete META cycle at this stage (November, 1996). In most cases groups have been through the stage of preparing performance plans. Some groups have been working on the production of team competency profiles.

It is interesting to note that various groups made use of the Belbin instrument to better understand the nature of the group, themselves as individuals and how they are perceived by others. Opinions have varied on the usefulness of the Belbin activity. Whereas some would point to its dramatic effect in sharpening self-awareness for some individuals, others have considered that it absorbed too much time and possibly diverted attention from key elements of the META process. In relation to progress in the production of competency profiles a team member commented:

> We tried to use them. We got sidetracked by Belbin really. We should have used those (competency lists) rather than gone along the Belbin track … Maybe we should have been doing a bit more work on the competency profiling and working out where we were in relation to the various competencies.

- **Composition of Teams**

  When information concerning META was first distributed, there was considerable interest from departments and from individuals, as evidenced by the number of separate groups that were established. The teams were not hand-picked, but were volunteers. In some cases established groups nominated to be involved, while at least one group was made up various individuals from within a general area. It appears that in at least one case, where progress was fairly slow and some cynicism was evident, those who complained initially still continued to attend team sessions. It is possible that the odd person might not have wished to be left out of a team activity or be perceived to be uncooperative. Over the period in which sessions were held it seems that some who were initially sceptical of the value of META became more open towards a team approach.

- **Evaluation Procedures**

  As referred to in the META Handbook Part 2 (Guide to Implementation) pages 26-27 the Hobart Institute was a trial site for the ANTA Best Practice Organisation Assessment Matrix. The Matrix, based on the Australian Quality awards was applied in November 1994 by Derek Casey and Rosemary Field who had been invited to conduct a workshop with senior staff and the Case Study Team (referred to earlier) and to conduct an Organisation Assessment in order to benchmark present performance. The instrument was 'a means of establishing benchmarks in key areas of the organisation: leadership, policy and planning, information and analysis, creative involvement of people, customer focus, quality of processes, products and services, access and equity and organisational performance'.

  The results of the Organisation Assessment serve as a benchmark for future applications of the instrument and will assist in their evaluation of effects of some of the META initiatives.

  As mentioned earlier, the third stage of the META implementation plan envisaged by the original adviser involved evaluation. The Institute intends that ongoing evaluation will be established as the program gathers momentum after a relatively quiet period during the absence of an adviser.

Considerations

- **Time**

  There seems to be almost total agreement that META is time-consuming. It will be of interest to note whether it is still viewed that way when teams have become well-established and functioning as a normal part of the organisational structure. At present there are concerns in some quarters that time for META is not specially provided for and it is seen as yet another demand on the individual. On the other hand it has been suggested that as the projects are chosen in relation to the strategic plan of the institution and generally focus on activities that the individual staff member would normally be involved in, it does not in fact represent an 'extra'.

  One staff member who was aware of the amount of time that META was taking during a quieter part of the year, expressed concern about how easily meetings will be fitted in during busier periods when it is revived after the lull during which there was no adviser.

- **Measuring Change**

  A challenge for the future that has been referred to by several staff was expressed by one person in these terms:

  > An issue would be the capacity to measure change in terms of organisational benefits and individual benefits at the same time, because that's one of the core principles, and also to tell you if you're using META successfully or not – because if you're only advantaging the organisation, then the team function will eventually disintegrate. It has to benefit the individual as well – and these have to be measurable benefits.

Some benefits of META

The view taken by the Hobart Institute is that META is still being tested, a continuation of earlier trials of which they were part. The following are some perceptions of META to the present time as presented by individual staff at different levels of the organisation and from different teams.

- **A Structure**

  John Upson, Director of the Institute and member of the Management Group Team, compared META with other forms of professional development (such as action learning, return to industry, mentoring) as follows:

  > I think it's more structured, from the point of view that it does make you look at the team competencies, which you won't normally get with similar programs. The other thing is that,

> because it is ongoing, there is an opportunity to continually work on a project, which not only gives you skills, but also gives the organisation something worthwhile.

- **META as an aid to staff induction**

  A recently arrived staff member felt that being involved in a META Team helped him to more quickly and more comfortably interact with other members of the group than would have otherwise been the case. In this, the Belbin process was helpful:

  > We went through the process when we all went through the Belbin – then we thought it would be a good idea to get the other team members to assess each other as well and give their perceptions. That was very useful too; whereas I may think I have a particular competency, they may see it differently.

  He had the impression that the META team processes helped people to be more aware of the difficulties that recently appointed staff face when placed in a new context and to be more tolerant.

- **Change Management**

  As expressed by a member of the Institute Management Team, META appears to offer promise in handling change:

  > I believe that if a team approach can be instilled, it will hold the place in good stead in terms of change management as well. We are going through a lot of change at the moment and if people can work together through these sorts of things – instead of just trying to deal with it on their own, as often happens in these sorts of projects – feeling isolated, threatened – then I think it will make for a much more flexible, healthy sort of organisation in the long term. A team approach, dealing with issues and working through change.

- **Information Exchange**

  The emphasis on individual involvement and participation in the team approach has been seen to be beneficial to all members. One team member commented:

  > Everyone is expected to participate in the group. So whilst they're participating they're also providing information to other people, and there's a transfer of skills and knowledge.

  This person's perception was that in using the META approach there was less of a tendency for some individuals to dominate discussion and more encouragement of each member of the group to take an active part in proceedings.

Conclusion

The Hobart Institute of TAFE has demonstrated a strong commitment to the concept of META. The META process is considered a means of bringing about institutional changes by establishing new team patterns and developing management competencies as projects are targeted on the Strategic Plan of the Institute. It has supported the META process by employing a full-time adviser, involving its Management Group and promoting the formation of other teams throughout the organisation. Any difficulties which have arisen are being addressed and a sound basis for further development has been established.

Case study

REGIONAL TRAINING SERVICES
WESTERN AUSTRALIA

> The whole focus of our operation is based on it (META principles) anyway and always has been. Even though I'm the principal of the organisation it's never been a me-you, me-them, kind of relations.
>
> Rob Stockdale, Director, Regional Training Services

The culture of the Regional Training Services (Western Australia) was so in tune with the ideas of META that it seemed completely logical for the organisation to apply to become a funded META pilot site. The company was successful in its application.

Regional training services

Regional Training Services is a regionally-based, privately owned company engaged in the design, delivery and evaluation of services to clients in the vocational employment sector. The company provides and supports training and employment development, with a particular focus on regional and remote Western Australia. It has area offices in a range of socio-economic regions: Kalgoorlie (mining), Bunbury (non-metropolitan industrial), Northam (rural wheat belt) and Albany (regional, export port).

The organisation is quality focussed, as is evident in its current preparation for Quality Assurance Certification to ISO 9001 and the Western Australian Department of Training's Quality Endorsed Training Organisation (QETO) standards.

The company employs 25 people, with a management team currently of six.

Scope of services

Some idea of the variety of services offered by Regional Training Services can be gained from the following examples (1996):

- Broker to the Department of Employment, Education, Training and Youth Affairs for labour market programs.
- Training Administration Body of over 500 of the State's apprentices and trainees for the Western Australian Department of Training.
- Contractors to the Western Australian Department of Training in the design, development and delivery of innovative employment-based programs.

- Registered providers of a wide range of accredited certificate courses and program designers of nationally accredited courses.
- Nominated Preferred Supplier of training to the Southern Aboriginal Corporation, covering the region from Bunbury to Ravensthorpe.
- Coordinators of the Murdoch University's Education School teacher training practicum in the Great Southern Region.
- Contractors to the Australian Yachting Federation to restructure their boat handling and sail training programs into competency-based training.

Regional Training Services has formalised a number of strategic alliances with other organisations to function as a group employer and labour hire unit as well as ESRA case manager to service the VET needs of the business sector more efficiently.

Some characteristics of the organisation

As is evident from the list of services that Regional Training Services offers, the company must be responsive to wider policy changes as they occur and be ready to initiate projects as opportunities arise. This places special demands on planning and scheduling.

As can be seen from the list of services offered, Regional Training Services covers vast distances, necessitating a good communication system. Area offices are in constant contact through telephone and Internet. Monthly teleconferences are held. Every three months the Management Team goes away somewhere for a conference. The entire staff of 25 come from various parts of the State for six-monthly meetings. As compared with an organisation located on one site, it would be expected that Regional Training Services would face particular challenges. The culture of the organisation is such that the managers, although in diverse locations, were able to report feeling a strong sense of identity with the company and the recognition that they are a team.

A related characteristic of the company is its strong belief in the importance of networking not only internally but with the wider community, at all levels. This occurs to a remarkable degree and must be seen as an important ingredient of its success in initiating ventures and in winning tenders.

Several managers independently have commented on the sensitivity and high level of trust that is shown by the director and the large measure of personal responsibility that he is prepared to give. One comment was:

> He treats each of the management team according to the needs of the individual. He will treat some of the staff differently and give them all sorts of support, whereas others, he'll just let them do their own thing.

Accepting META

The company first became aware of META from an information sheet circulated by the META Coordinator in Western Australia. It had immediate attractions. As explained by Len van der Waag, responsible for Training Development:

> We looked to META as providing the management structure, the framework, for how the company could be managed within quality assurance.

The intention of the company was to examine META carefully, not only for its potential within their own company, but also with a view to its subsequent promotion and marketing as a training program. Two members of the organisation attended the Advisers' Workshop – Len van der Waag and Tony Fitzpatrick, Regional Manager, Southern Region (Albany). It appears that Tony's primary role was to assess whether META would be viable for the company, and Len had a special interest in its potential, coordination and implementation. Features of the workshop that were commented on were its credibility and the fact that those running it had conviction – 'they had the faith'. Len noted that he felt confident of fulfilling the role of adviser, but would have been much less so if he had not been involved in an Action Learning Program offered three years previously by the National Staff Development Committee. The decision was taken to become involved in META.

The six people in the Management Team agreed to engage in META and reach a decision concerning its future role in the company at the December 1996 meeting of all staff.

META team workshops

The induction of the Management Team to META was aided by a fortunate coincidence. An Australian Institute of Management (AIM) Training Week had been programmed at Katanning, for the Management Team shortly after the META Workshop attended by the two staff members. The AIM Program Tutor was requested to focus the presentation on META, which he agreed to do as it was felt that META had considerable overlap with the Certificate in Management Principles.

At the workshop the tutor, Tony Aveling, who had carefully familiarised himself with the META materials, presented sessions in the context of META, drawing upon the META adviser, Len van der Waag at appropriate times to make explanations from the adviser's workshop that he had attended.

This appears to have been a very positive experience for the Management Team and reinforced the fact that META draws upon well-established management principles.

As noted earlier, the climate of the organisation is supportive of META principles, with staff already operating as a team. The mission statement for the organisation provided a focus:

> We want to be, and be seen to be, in three years' time: The leader in promoting, developing and managing the provision of best quality services and products to the workplace, with a focus on regional and remote regions in Australia.

At the Katanning Workshop it appears that quite a lot of attention was given to scanning of the environment through such means as SWOT analysis: identifying strengths and weaknesses of Regional Training Services and considering opportunities and threats in the market place. Less emphasis was placed on other META shells. They were mainly used 'to get information, to get the enthusiasm and to get people asking the questions in the first place'.

As the management group was not large and as the management workshop took place over an extended period various individuals had the opportunity to go through the META materials in the evenings and raise questions on them next day. The sub-group of managers who examined the materials closely is reported to have found them 'easy and user friendly'. The adviser commented on how much more readable they were than the competency-based training materials he had experienced in a previous national program.

The Project

The META project that was decided upon by the team was reported as being:

> to develop a set of Guiding Questions for the Management Team and the second part is to list required steps that have to be followed – commitments that have to be made...– a set of processes to implement any decisions that we make... That will become the agenda for every management meeting. It will also become the framework for the induction of new senior staff into the company.

There was strong endorsement given by the Management Group to the nature of the Team and Individual Competencies set out in the META Handbooks. These have been seen as contributing to a framework or structure that will guide the organisation as it continues to grow. It was felt, however, that there was a need 'to remove the jargon' from the competencies so that they would be more user-friendly.

Len, the adviser, was delegated the task of designing key questions around the team and individual competencies, bearing on the organisation, its mission and strategic plan. In framing these key questions to suit the company context the adviser has found the performance criteria, range and evidence guide for each competency provided in the META handbooks to be a valuable resource.

A progress report on the framing of the draft Team Performance Plan was given to a team meeting three months later in Kalgoorlie and feedback was sought from the managers on some of the customised material. The team liked the work that Len had done on framing the competency-based questions and made suggestions concerning some which were thought rather too jargonistic. The completed set of guiding questions and the related performance criteria will be a major item on the agenda at the full- staff meeting in December, 1996.

Recognition of competencies

It is considered that META will provide not only a structural framework for the company but will also enable the monitoring of the performance of the team.

Close attention is being given to both team and individual competencies which Regional Training Services consider to be two sides of the coin. The competencies will be spelled out in terms of what the individual does for the team and what the team must do for the individual.

There is a further reason suggested by Regional Training Services for giving attention to individual competencies. It is particularly important for staff who are on contract to have documentation and recognition of their competencies if they were at some stage to apply for positions outside the company. Possible accreditation of META is therefore seen as an issue. There is interest in the relationship between META and the Front-line Manager, a matter that apparently was raised at the Advisers' Workshop.

The Adviser role

The adviser responsible for facilitating the implementation of META accepted the recommendations from the advisers' workshop and the META Handbooks that components of META should be fashioned to the local context, rather than include every element and slavishly follow a particular sequence. His confidence to draw upon the META material to suit the company's needs was reinforced by his previous experience of CBT in Action Learning and illustrated by his comment:

> I just approached the kit: 'I'll use you as I see fit'.

For Regional Training Services this has included following the team's suggestion that the competencies be translated into everyday usage and the performance criteria into user work-principles.

Outcomes

The outcomes that Regional Training Services hopes will be achieved through META in relation to the individual staff member were stated to be:

- they will have an input into company growth and that will be translated into financial recognition, including bonuses;
- that their professional development needs are identified and addressed; and
- that each will improve the chances of the company attaining quality assurance certification through enhanced knowledge of what the company is about.

In relation to the desired outcomes of the META process for the team (as well as for the organisation), these are seen to be niche market development and company growth.

Perceptions of META

- **Niche Marketing**

  Because META is a process that involves teams analysing situations and determining how best they may be addressed, it is well suited to a company such as Regional Training Services that is involved in niche marketing. The customised META process being developed by the company will enhance its ability to respond promptly and appropriately.

- **A Wider Company Perspective**

  The META process has been found attractive by Regional Training Services for the way it encourages each individual to take a company-wide perspective. The META approach is in keeping with the company requirement for each staff member to be alert for opportunities that the company may wish to act on, including those outside their own particular job description. With a small staff, the company-wide perspective has been readily sustained. With the growing organisation this could be more difficult without a framework such as the one META will provide.

- **Providing a Formal Development Structure**

  A major attraction of META for the company, as mentioned earlier, is the way it has provided a formal structure for what had been happening previously in a rather ad hoc way, because of the need to react quickly to changing circumstances and new opportunities. Using the META approach provides for more coherence and ordered development.

One of the staff based in a town far from Albany commented enthusiastically about the sense of direction that META offers:

> META brings you together. It gives aims and goals – definite goals, having a plan of where we're going. Even though we're constantly changing, with the influx of work. META gives clear directions. It lets you know what your options are.
>
> It's a good way of communicating. It asks the questions which should be asked in an open organisation.

- **An Induction Guide**

  As the company grows it cannot be taken for granted that each person will absorb the culture of the organisation without specific guidance. The META project which is being developed is expected to give rise to a set of key questions that will not only assist the achievement of the company mission statement, but will also serve as an induction guide for those new to the organisation.

- **Heightened Personal Awareness**

  The introduction of META has caused some staff to be more reflective about their roles. One example quoted was that of a manager, through engagement in team and individual analysis of competencies, coming to a realisation that their interests were not so much in management but in another role within the organisation. This person had been in the management position for some years but it was only through META processes that true priorities had crystallised. A change in role was arranged.

The Future

META is being tested by the Management Team and is currently viewed with considerable optimism. The rationale for META is accepted by the company which sees it as being consistent with the philosophy of Regional Training Services. Regardless of the form in which it eventually evolves, META would seem to have already made a considerable contribution to the company in providing a structure and framework for ongoing development and performance management.

Case study

BURSWOOD INTERNATIONAL CASINO RESORT
PERTH

Preamble

The Burswood International Resort Casino, in Perth, is part of a complex comprising the Casino, the Burswood Convention Centre, the Burswood Dome Complex, the Burswood Resort Hotel and Burswood Park (which includes the 18-hole Burswood Park Public Golf Course and a Heritage Trail). Burswood's 401 million share units are held by a mix of institutional and private investors. The Burswood Casino employs approximately 3000 staff and has a daily patronage of between 5000 and 15 000 people.

As the department which is currently trialing the use of the META program, the Food and Beverage Department of the Burswood Casino is the focus of this case study. Because the Casino has only recently commenced META, this case study relates to the initial considerations and early experiences.

Food and beverage

The Food and Beverage Department is one of the largest departments, with about 950 staff. It is responsible for the effective operation of all restaurants, fast food outlets and bars throughout the Resort. The responsibilities include the Ballroom and various function rooms in the Convention Centre, the Dome and staff cafeteria.

The present target group for META consists of the five or six managers who report directly to the Vice-President Food and Beverage, Alan Hibbert. In addition to these managers the META group includes the Vice-President, Food and Beverage, a staff member from the Human Resources Department, Greg Italiano and Kath Lloyd, Food & Beverage Department. Both Greg and Kath attended the META Advisers' Workshop.

Corporate culture

The mission statement for the Burswood Resort Casino has a strong customer focus, aiming to:

- deliver the highest level of service, friendliness, courtesy, cleanliness and value to our customers;
- create an environment for all employees which achieves trust and mutual respect, rewards for superior performance, opportunities for personal advancement, open communications, and above all, the highest level of service to our customers; and
- out-perform our competition in revenues and profitability to ensure a return which will enable us to attract capital to grow our business, enhance our superior facilities, and recruit, motivate, and retain outstanding employees.

The approach to people in its broad sense and also to people in training and development is considered to be a high priority in the organisation. A Training and Development Officer noted:

> We need people to have skills, who can meet the guests' needs, who are going to create a positive interaction, and we have to resource and act in order to deliver that.

In recent years there has been a deliberate effort to make the Food and Beverage Department less hierarchical and less autocratic in management. Staff are given more freedom to undertake projects and are expected to accept the related responsibility and accountability.

Introduction to META

Keith Mitchell, Recruitment and Training Manager at the Casino, first heard of META from Juris Varpins, the META Coordinator for Western Australia, through their membership of the State Management Best Practice Development Committee. After examination of the kit, it was decided that two staff from the Human Resources Department would attend the adviser training program – Greg Italiano, Training Officer, and Kath Lloyd from the Food and Beverage Department in which it was envisaged META could be trialed.

The philosophy underlying META appealed to the organisation. For a private company, however, some aspects of the Advisers' Workshop were not always plain sailing, with its emphasis on the public sector and an assumption that those present were familiar with the way in which the public sector operates. The frequent use of acronyms made it more difficult. The Burswood Casino was already identified with the eight best practice principles on which META is based and it seemed from the workshop to be very likely that META could complement strategies that were already in place.

The appearance of META was timely in that it coincided with other initiatives that the Casino had recently introduced and offered some particular opportunities. Alan Hibbert pointed out:

> We appear to be very good at organising training for general staff and the people that we neglect seem to be those near the top.

He envisaged that META could provide a structure that would more deliberately address the objectives of the Department:

> Occasionally we come to the point: 'That was in the objectives: Why aren't we doing something about it?' So we keep on referring back to it, but not actually doing much about it. It's a question of getting the team together with a tangible focus on planning – and I think that's where we're lacking.

A further reason for considering introducing META to the organisation was the opportunity it provided for the further development of management competencies. The policy of the organisation has been to promote people from within. People worked their way up the organisation and in doing that may not have had the opportunity to take a university degree or TAFE management training course. As pointed out by a Human Resources staff member, they may be very good at their jobs at front-line but may have a need for further administrative and management skills to back up their specific technical job.

The decision was taken to introduce the META process to the Food and Beverage management group, seek their reactions and explore META's potential.

The nature of the team

The Food and Beverage Department reflects considerable diversity, 'language-wise, culturally and in type of production'. The department is split up into teams 'which have a different workload, and a different format of accreditation from the public bar... to the fast food restaurant to the (more exclusive) restaurants'.

The departments within Food and Beverage cooperate on major projects. It was felt, however, that by applying the META approach to team planning and implementation, further benefits could be achieved in relation to a Team Performance Plan. A Human Resources staff member felt that at present the various sections still run very independently of each other. He felt that it would be preferable:

> for their team interaction to take on a more focussed and development point of view, as opposed to problem-solving on an informal basis – a more team-based response to achieve their team performance.

Explorations with staff

In recent times departments have given closer attention to goals and objectives derived from the Business Processes for the organisation. Some of the groundwork for a META project had already been done:

> There has already been one review of the (goals and objectives), so in essence the Team Performance Plan did exist before META came along.... The method by which it was constructed was pretty inclusive and consultative. There are no issues in terms of what the objectives are in terms of focus. The issue is purely, in a META context, can we adopt this as a process that might be viewed as an efficient and effective way of attaining those particular goals and objectives?

The challenge of putting the META approach to the Management Team was described as follows:

> In getting … people to see that there are areas in the Food and Beverage Department where they have a mutual interest and where they can benefit from a team approach is not easy, because the history is that 'I'm managing my side of things and this is the way it works'.

In relation to expectations that one department may have of another for a particular project, conflicting interests could sometimes arise, thus making true teamwork a more complex issue.

At the initial meetings in the 'Getting Ready' phase the management team was asked to consider the objectives of the Food and Beverage Department and such questions as:

- What is your department doing?
- How do you feel about this?
- Would you feel that there are any advantages in working as a team on this?

Issues such as staff recruitment came up (related to one of the objectives). This is something that more immediately concerns some sections more than others. The advantages of taking a wider team perspective were explored, with the suggestion that there may be alternative ways of looking at issues. It is to be noted that the facilitator's approach has not been that of attempting to 'sell' META. In fact, the META acronym itself was deliberately avoided. The team process was introduced as a natural part of examining and acting on issues and objectives in which all have a stake, whether directly or indirectly. It was not presented as an 'extra' but 'as something to help you in what you are accountable to achieve anyway'.

It is too early to be able to report with any certainty on the how the team wishes to proceed. Some initial reactions were:

> This is just 'Investors in People' again [a program recently introduced] Why are we doing this again?
>
> Don't worry about us we are successful anyway.
>
> I'm totally different from them. Their issues are not my issues.
>
> [referring to different sections with differing responsibilities]

Arising from a second meeting was the commitment to review where they were at the present time and to take it from there. It is considered to be likely that as the process proceeds, sub-groups will follow up tasks, involving other staff in their respective areas and report back to the larger group.

Some other issues

(1) Time

Time is probably a more complex issue in this organisation than in most because the Burswood Resort Casino operates 24 hours a day and seven days per week. In addition at certain periods some people may be working up to 90 hours per week. Finding a common time to bring people together is a challenge. Any program offered must compete with other demands on time and clearly be seen to be potentially more effective and efficient than current practice.

(2) Team building

The issue of time is a consideration in deciding whether special sessions will be devoted to team building. It is believed by the facilitator that explorations of team processes could be beneficial. In the overall scheme of things, with the time constraints mentioned above, it is by no means certain that it will be possible to include these.

(3) Developing competencies

It is anticipated that the focus will be on team competencies, with much less attention to individual competencies in a META program operated at the Casino. As the team explores its competencies in relation to particular tasks, so the individual will naturally reflect upon his/her individual competencies. These may be addressed through other avenues within the organisation. Identification of individual training needs is also to be covered through other means such as the established performance management procedures. The Front-line Manager Initiative also addresses individual competencies.

(4) META and other initiatives

Passing reference has been made earlier to two other staff development initiatives with which the Burswood International Resort Casino has been involved. These are Investors in People and the Front-line Manager Initiative. The Burswood Casino is one of a number of companies that acted as a pilot for the Investors in People Program in Australia. Investors in People is a program that relates the training and development needs of employers to a company's business objectives. Organisations work towards reaching a national standard which embodies the following principles (as described by T. Whitely in the article *Investors in People*):

- Commitment: An 'Investor in People' makes a public commitment from the top of the organisation to develop all employees to achieve its business objectives.

- Planning: An 'Investor in People' regularly reviews the training and development needs of all employees.
- Action: An 'Investor in People' takes action to train and develop individuals on recruitment and throughout their employment.
- Evaluation: An 'Investor in People' evaluates the investment in training and development to assess achievement and to improve future effectiveness.

The Burswood Casino has achieved accreditation for its program.

The second innovative training and development program with which the Burswood Casino is involved is the Front-line Manager Initiative. This program is based on the assessment of competence, indicating where people are in relation to specific manager standards. It is concerned with the application of knowledge and skills in the workplace. The Front-line Manager Initiative program has been nationally recognised and is seen as attractive for its specification and identification of individual development outcomes.

META is viewed by the facilitators at the Casino as being complementary to the above programs. The business plan focus of META and the emphasis upon team competencies are seen as considerable strengths.

APPENDIX B

Expected benefits from META when applying for funding

The complete list summarised in Section 4, findings are listed below:

Culture change

- culture change within the whole organisation (2)
- culture change within a team (2)

Team development

- within governing body and approach to campus operations (2)
- team approach (2)
- improved teamwork between the senior executive
- a more informed approach to the implementation of work teams across the Institute
- building a close-knit team from a diverse group
- more cohesive teams with much clearer ideas of how effective teams function (and how they can be developed) (2)
- process to promote teams and develop management (2)
- awareness of and improvement in team work
- development of a real team approach to Institute management
- work more cooperatively

Management

- effective management strategies for Institute
- identification of management development needs of META team members
- better management
- ongoing management development needed
- management development for managers... with an emphasis on relationship building and team development (2)
- assist in development of management competencies (2)

- a more cohesive team approach to management
- opportunities for staff to explore management issues
- opportunities for staff to utilise different strategies in their approach to management

Planning

- further development of business planning
- strategic planning on a team and local level
- a framework for organisational planning
- facilitate other planning
- to facilitate development of a team performance plan
- chance to disseminate business plan in a different way
- implementation of strategic plan objectives through the use of META tools

Purposefulness

- focus on best practice
- opportunity to look at new methods
- systematic approach to problems
- focus on how we do ('organise') our work and also how we explain it to each others
- assistance with existing continuous improvement program

Outcomes focus

- realisation of common goals
- outcomes based
- increased productivity and quality of work through better interaction of the team
- a focussed group achieving a task

Professional development

- professional development of the META team
- development of staff – professional and organisational growth
- to contribute to individual and team professional development
- increased and more targeted individual and team development
- facilitate implementation of META as staff development strategy
- training for the adviser
- improve level of management skills of Heads of Departments
- skilling up a group of managers

- development of potential managers
- personal development of staff
- professional development plans established

Competencies

- identification of competencies
- it is competency based
- focus on competency-based performance
- competency assessment of individuals
- enhanced individual management skills

Support

- support for continuous improvement process across the Institute
- build on an existing program recently put in place
- (demonstrating contribution to) workplace learning and improvement
- potential assistance with Quality Accreditation
- to be an aid in a restructuring process and to be assessed as a management 'tool'
- it's a 'win-win'

Provision of funding

- funding to support the adviser/team project

Communication

- improved cross-organisational communications
- opportunity to test existing management communication systems

APPENDIX C

List of other management development programs nominated in the survey

By Chief Executives

- Meet the Minds
- Self Assessment/Performance Appraisal (several responses)
- General 'Management Development Programs' (several responses)
- Mentoring
- Training action plan
- DIY 360 o
- Quality customer survey
- Front-line Manager programs
- Quality Management & Assurance (several responses)
- Regional ACFE Professional Development
- Brainfood Conference
- Internal Business Planning
- Leadership Development for Education
- Management and Leadership Course (several responses)
- Internal teams development programs
- Supervisory programs
- Workplace trainer
- Mentoring
- NIES – World Competitive Manufacturing
- Victorian Enterprise Network
- NCOSS Management Training
- CIDA Administrator Training
- External consultants
- Internal programs (several responses)

By Participants

- Benchmarking
- 4 Quadrant Management
- Leadership Development for Education and Training Managers
- Women in Management
- Leadership Effectiveness Training
- NSW TAFE Institute Manager Program (Action Learning)
- CPA Management Training
- Strategic Planning
- College Development Planning
- AIM
- Performance Management
- Performance Review and Development
- In Search of Excellence
- Action Learning Set
- Leadership Program
- Leadership Practices Inventory
- Managing for Productivity
- Skills Workshop for Managers
- Investment in Excellence
- TQM
- Quality Teams & Circles
- Effective Personal Productivity
- VCOSS-Community Management
- Victorian Enterprise Workshops
- Mollinsey 3'P' Project (Westpac)
- Cultural Change Programs
- Team Building Programs of MBTI
- Executive Capabilities Program
- Project Management

APPENDIX D

Strengths of and difficulties relating to META—as perceived by advisers

The complete list summarised in Section 4, findings are listed below:

1 Strengths

Design

- relevant to current theories and practices
- good structure
- inherent culture of the model
- clearly structured framework (5)
- planning process
- link to organisational goal
- focuses attention on strategic goals
- clear explanations and principles
- logical process
- the logical planning to be carried out
- getting ready – strengths and shared direction
- emphasis on strategic (TPP) planning
- reinforcer of strategic process planning
- business plan focus
- case study oriented
- a system to achieve an outcome
- systematic approach to implementation
- linked to workplace
- relevance to work role
- its T/Trainer program

Organisational Change

- assists with 'cultural change'
- improved organisational culture
- concentrates on organisation's strengths etc.
- emphasis on change

Strategic Focus

- strategic focus
- provides focus

Team Focus

- development of the team (2)
- team participation
- development of a team approach (2)
- team building (2)
- its focus on team culture
- building team empathy in work groups
- valuing the team process
- team oriented
- team planning
- team enhancement
- group development aspect
- team-based management development
- team performance plan (2)
- opportunities for team development

Staff Development

- collaborative approach to staff development
- management development
- brought out personal team development needs
- promotes teamwork and team building

Flexibility

- its flexibility (4)
- adaptability (2)
- enables diverse learning strategies to achieve end result

- allows groups to experiment with processes not available to them as a matter of course in operational activities

Competencies

- competencies are well explained
- its lay-out and focus on competencies
- focus on competencies
- good content
- clear guidelines and direction

Cost Effectiveness

- 'in-house' therefore saves time and cost

Pay-offs

- achieving organisational goal while learning
- high level commitment and involvement
- low threat level to participants e.g. volunteers
- improvement of individual working conditions

Self Review and Learning

- self learning
- challenging to, but supportive of, individual participants
- people starting to learn more about themselves and others
- reading and self-education involved
- opportunity for individuals to review their own situation and position in the organisation
- mirror on past practices – e.g. contrast

Tools

- simple to understand the tools
- tools may be customised
- templates are user friendly
- use of competencies as a tool
- materials (2)
- shells
- implementation shells concept

2 Difficulties

Context

- no real problems with kit or process as we used it; however, turbulent times in TAFE and our organisation led to many difficulties
- timing – TAFE/VET undergoing great change

Organisational Culture

- focus of executive not on development
- organisational cultural framework needs to be just right

Design and Structure

- too conceptual, competencies too abstract for group
- not convinced of its validity in theory
- structure
- it is too lock-step
- loose framework
- may be too loose – all things to all people
- isolation (from) other programs (e.g. FMI)

Training

- adviser/facilitator training
- skill level required to facilitate good implementation
- level of underpinning knowledge required for implementation
- lack of quality training for adviser

Cost Effectiveness

- not a quick return on investment
- hard to see value for money

Initiating and Sustaining

- staff motivation in adverse environments (e.g. DVET review)
- residual uncertainties about something new
- encouraging senior managers to work through the process
- convincing staff it is a good thing
- selling the META process on an ongoing basis
- reluctance of Senior Management Team to work through competencies
- managing directors need to drive the process in small organisations

- keeping teams motivated
- obtaining and maintaining team interest
- retaining continuity of ideas when breaks occur
- a 'team' may not go into META voluntarily
- no difficulties with META – difficulties with turn-over of staff since inception
- unanimous team commitment (required)
- requires drive and initiative from the team members to follow through
- not sufficient benefit to keep participants' interest
- poor implementation
- a manager may not fully accept META principles
- tendency to use the kit as a crutch
- perhaps seen as another system, not one that can be applied to any system e.g. TQM, JIT, META

Team Functioning

- (incorrect) perception that the group works as a team
- inclusion of new team members throughout the process

Time

- time commitment
- time availability – first and foremost
- need for large lead-in time
- the building of the program into established timetables
- needs dedicated time rather than just slotted in as another extra activity
- time-frames
- the time involved where team is put together for the META experience especially where individuals are unwilling
- time involved – hard to customise, take short cuts
- getting a team together in one place at one time
- getting busy people to devote time to task and learning
- problem of keeping a group of busy people together
- time required for team activities
- meeting on a regular basis and picking up from the previous meeting
- time to complete the program
- time and effort to implement and advise
- time and resources (not specific to META)

Funding of Adviser Position

- no time allowed for adviser role
- a META adviser expected to do project on top of everything especially in a small organisation, even though hours are specified (workload)
- each team member at a different level

Complexity

- simplifying the concept
- keeping the whole thing simple and workable
- too many processes – process becomes more important than doing things
- trying to remain focussed on one section of the META process
- too much META material
- understanding of members lacking even though explanations have been given a number of times

Competency

- the concept of competency
- difficulty in rating/scoring/understanding competency profiling
- honesty and openness in competency profiling
- applying the competencies meaningfully
- working through competencies
- the competency profiles were a more complicated stage
- competencies and self evaluation process
- interpretation/creation of competencies
- collection of documentation to prove competency
- supervisors trained as workplace assessors to validate competencies

Accreditation

- accreditation to accredited education

Transferability

- not necessarily transferable to other sectors

Funding

- Lack of funding for professional development

APPENDIX E

Questionnaires

The following pages are copies of the five questionnaires distributed to:

- State/Territory Coordinators
- META Advisers
- Chief Executives of Organisations using META
- Participants
- Organisations who had expressed an interest in META

Details of how these were applied are contained in Section 3, Methodology.

QUESTIONNAIRE

to State/Territory Coordinators of META

The purpose of this questionnaire is to seek information about META from State/Territory Coordinators of the program. Your knowledge and experiences with META will be of considerable assistance in this national evaluation. Please note that the information that you provide will be used in our final reporting.

State/Territory ....

Name of person completing this questionnaire ....

Phone no. ....

Questionnaire

Involvement in META Projects

D1 How many advisers are involved in operating META in your State/Territory? ....

D2 How many organisations in your State/Territory are using META, to your knowledge? ....

D3 How many of these organisations received META grant funding as a direct result of their submissions? ....

D4 How many individual META teams are there in your State/Territory? (as distinct from sites/organisations) ....

D5 To your knowledge, how many META projects have terminated before the expected time? ....

D6 What have been the reasons for projects not reaching completion?

....

....

....

....

D7 To your knowledge, what reasons have people given for not taking up META at all?

....

....

....

....

Communication with META Advisers

D8 What forms of communication have you had with META advisers? Please tick.

1 telephone .... ☐

2 letter .... ☐

3 Internet .... ☐

4 network face-to-face meetings .... ☐

5 teleconference .... ☐

6 other? (Please state) .... ☐

D9 What was the most effective form of communication? ....

Adviser Training

D10 What training did you arrange for META advisers?

....

....

....

....

D11 Are there any changes that you would wish to make in future to your META training course offered to advisers? .... Yes/No

If so, please describe ....

....

....

....

Network Meetings

D12 What form have network meetings taken? ....

....

....

....

D13 How frequently have network meetings been held? ....

D14 How many meetings have been held? ....

D15 What has been the average percentage attendance of advisers at network meetings? .... %

D16 What major issues associated with META were discussed at these meetings?

....

....

....

....

....

The use of META materials and System

D17 What have been any areas of difficulty reported by advisers in using META materials?..

....

....

....

D18 Are there any changes to the META Kit you would recommend?.......... Yes/No

If yes, please explain ....

....

....

....

D19 What difficulties, if any, have been experienced by advisers in using the META scheme?

....

....

....

....

....

D20 What benefits appear to have arisen for organisations from the use of the META scheme and materials?

....

....

....

....

D21 What evaluation of META and training of META advisers, apart from the national evaluation, has been conducted within the State/Territory?

....

....

....

D22 Is this information available to the national evaluators?............................ Yes/No

META On-line

D23 What do see to be the potential advantages of having the META materials on-line?

....

....

....

D24 What possible limitations or difficulties do you foresee in having META on-line?

....

....

....

D25 Do you have any suggestions that would facilitate the success of META on-line?

....

....

....

Thank you for your help. Would you please return the questionnaire by March 7, 1997 to:

Evaluation & Development Services Pty Ltd
PO Box 376, Glenside, S.A. 5065

QUESTIONNAIRE

Advisers to META Teams

This questionnaire is intended for completion by each adviser to a META team. The information received will assist in the preparation of a national evaluation report. The person completing this questionnaire and the organisation will not be identified in the use of the data, unless written permission has been obtained. Please answer the following questions in the spaces provided or by marking the appropriate responses.

The following information is to allow the consultants to telephone you with any questions

Name of adviser completing this questionnaire..

Adviser telephone number..

Name of organisation...

Questionnaire

B4 What is the source(s) of funding for META in this organisation?

....

B5 What overall benefits did you expect would arise from META at the time you applied for funding?

....

....

....

B5 How many individual META Teams are there in this organisation?...................

B6 How many META advisers are there in this organisation?..................................

B7 What proportion of adviser time is allocated for META responsibilities? ....

B8 Please fill in the chart below the following in relation to META in your organisation:

- the title of each separate team
- whether each project team was: (a) Senior Management Team (b) Team of Managers (c) a current Work unit (d) a special project Team (e) Other?
- the number of participants (excluding adviser)
- range of levels of staff involved
- an estimate of the total hours of team meetings for each project.

(Affix additional sheet if necessary)

	Title of team/project	*Type of team*	*No in team*	*Range of mgt levels*	*Total hrs meeting*
B8.1					
B8.2					
B8.3					
B8.4					
B8.5					

B9 In relation to the single project which involved the largest number of participants were the members of the team:

1 entirely volunteers.. ☐

2 largely volunteers.. ☐

3 required to participate?.. ☐

4 other.. ☐

B10 In relation to this same project, were they:

1 a specially formed group.. ☐

2 an existing group.. ☐

B11 Also in relation to the project which involved the largest number of participants, please indicate whether in your opinion the amount of time spent on each step was appropriate. For each step, circle the relevant response:

		did not occur	*too little time*	*about right time*	*too much time*
11.1	Getting Ready	1	2	3	4
11.2	Preparing a Team Performance Plan	1	2	3	4
11.3.1	Producing Team Competency Profiles	1	2	3	4
11.3.2	Producing Individual Competency Profiles	1	2	3	4
11.4.1	Negotiating a Management Development Agreement	1	2	3	4
11.4.2	Signing a Formal Agreement	1	2	3	4
11.5	Monitoring and Reviewing Progress	1	2	3	4

Add any explanatory or other comments in relation to any of the above

....

....

....

B12 Indicate any changes in emphasis that, in retrospect, you feel could have been desirable in this project, with reasons:

....

....

....

B13 For the META teams listed above, please provide an estimate of the following costs in relation to the implementation of the META scheme:

	Team 1	*Team 2*	*Team 3*	*Team 4*	*Team 5*
Adviser Time	$..........	....	....	....	....
Participant Time	$..........	....	....	....	....
Local Evaluation Time	$..........	....	....	....	....
Other Expenses	$..........	....	....	....	....
Total costs	$..........	....	....	....	....

B14 From your overall experience with META how effective do you consider the general design of the META model (comprising the above steps) to be? (circle response)

Ineffective				*Very Effective*
1	2	3	4	5

Reasons?

....

....

B15 Are there any changes that you would recommend?

....

....

B16 What has been the nature of contact of participants with the META materials? Please tick the relevant response(s):

1 META kits distributed to staff.. ☐

2 META kits accessible to staff as loan copies for those interested .... ☐

3 Photocopied sections/instruments distributed as appropriate...................... ☐

4 META materials available to team .... ☐

5 Modified material produced and distributed to team................................ ☐

6 Incorporated META into the overall Professional Development Program. ☐

7 Other?.. ☐

B17 Would you have done it differently now? (Delete one).......................... Yes/No

If yes, please explain

....

....

B18 In relation to competencies used in the project which involved the greatest number of participants, were these competencies: (Please tick)

1 Taken from META unchanged.. ☐

2 Adapted (customised) from META.. ☐

3 An existing set from another source
(Please name)... ☐

4 Created specially for the project.. ☐

5 Other?... ☐

B19 Please rate the META Kit on the following criteria, adding explanatory comments where possible. (circle)

	Very Poor		*Excellent*		*Comment*
1 Overall Design	1	2	3	4	5
2 Readability	1	2	3	4	5
3 Layout	1	2	3	4	5
4 Useability	1	2	3	4	5
5 Appropriateness	1	2	3	4	5
6 Ease to adapt (customise)	1	2	3	4	5

Further comments?..

....

....

....

B20 It is intended that META will be made available on-line (internet) in future. In the light of your comments above please make any suggestions for improvement that you feel should be considered.

....

....

....

....

....

B21 What do you consider should be essential criteria for the selection of people for the adviser position?

....

....

....

B22 In relation to the Adviser Training Course that you attended please rate the course on the following criteria: (circle)

	Very Poor		*Excellent*		*Comment*
1 Clarity of presentation	1	2	3	4	5
2 Methods of presentation	1	2	3	4	5
3 Relevance of content	1	2	3	4	5
4 Development of your personal confidence	1	2	3	4	5
5 Length of workshop	1	2	3	4	5

B23 Are there additional topics that should be included in the training?

....

....

....

B24 Further comments?

....

....

....

....

B25 Is an adviser training workshop essential in your opinion? (delete one).. Yes/No

Comment?..

....

....

B26 Please rate state/territory adviser meetings on the following criteria: (circle)

	Very Poor		*Excellent*		*Comment*
1 Usefulness	1	2	3	4	5
2 Frequency	1	2	3	4	5
3 Relevance of content	1	2	3	4	5
4 Contribution to networking	1	2	3	4	5

Further comment?..

....

....

....

B27 To what extent was each of the following an issue while undertaking the META scheme?

	Not an issue		*Major issue*		*Comment*
1 Lack of clear notion of the adviser role	1	2	3	4	5
2 Staff unwillingness to be involved in META	1	2	3	4	5
3 Disparity between organisational culture and the META principles	1	2	3	4	5
4 Sustainability of project(s)	1	2	3	4	5
5 Limited information about obtaining credit transfer (RPL) for competencies acquired	1	2	3	4	5
6 Organising for internal evaluation of META	1	2	3	4	5

B28 How does META compare with the best of other forms of professional development that you have experienced (such as action learning, return to industry, mentoring, 'off the job' courses) ? For each of the following please circle the appropriate response number.

	inferior to others		*superior to others*		*Comment*
1 relevance to goals of the institution	1	2	3	4	5
2 level of participant satisfaction	1	2	3	4	5
3 tangible outcomes	1	2	3	4	5
4 apparent cost effectiveness	1	2	3	4	5

B29 How confident are you that the intended outcomes for the META project in your organisation will be achieved?:

	Not at all confident				*Very confident*
(a) in relation to the individual	1	2	3	4	5
(b) in relation to the team	1	2	3	4	5
(c) in relation to the organisation	1	2	3	4	5

Comments..

....

....

B30 What do you consider to be the three most important strengths of META?

1..

2..

3..

B31 What do you consider to be difficulties associated with META? Please list up to three major difficulties.

1..

2..

3..

B32 The following factors appear to have influenced (positively or negatively) the way in which META has progressed in organisations. From your experiences how important an influence has each of these been in your organisation?

For each factor please circle relevant response indicating whether it was of High level of influence (H), Medium level of influence (M) , or Low level of influence (L)

1	support from the administration	H	M	L
2	prior team development skills of an adviser	H	M	L
3	previous experience in 'META' trials	H	M	L
4	consistency between organisational culture and META principles	H	M	L
5	length of time an adviser is available	H	M	L
6	motivation to adopt META	H	M	L
7	team building activities	H	M	L
8	level of trust between participants	H	M	L
9	extent to which a team already exists	H	M	L
10	the composition and background of the team	H	M	L
11	the size of the team	H	M	L
12	type of team (management team, work unit, project teams)	H	M	L
13	continuity of team membership	H	M	L
14	how META is introduced/induction	H	M	L
15	how team leadership is perceived and handled	H	M	L
16	relative emphasis given to task and process	H	M	L
17	use/appropriateness of team performance plan	H	M	L
18	perceived importance of the task to the individual/team	H	M	L
19	selection/development of competencies for team	H	M	L

20	emphasis placed on individual competencies	H	M	L
21	use made of the META literature	H	M	L
22	integration into the organisation's professional development plans	H	M	L
23	amount of time available	H	M	L
24	evidence of achievement of outcomes	H	M	L

B33 Any further factors affecting the way META has progressed?

....

....

....

B34 To what extent did your application of the META scheme exemplify each of the following principles: High Extent (H): Medium Extent (M): Low Extent (L) (Please circle response)

1	supports the strategic & business plans of the organisation	H	M	L
2	meets the needs of the organisation, the team and the individual	H	M	L
3	encourages diversity and flexibility in learning strategy	H	M	L
4	is competency based	H	M	L
5	is team oriented	H	M	L
6	articulates with accredited education and training and recognises RPL	H	M	L
7	incorporates equity and promotes cultural diversity	H	M	L
8	is career long	H	M	L

Comments? ....

....

....

Any other comments about META? ....

....

....

....

....

....

Thank you for your help. Would you please return the questionnaire WITH THE EXECUTIVE AND PARTICIPANT QUESTIONNAIRES by MARCH 10, 1997 to:

Evaluation & Development Services Pty. Ltd.
Box 376, Glenside, S.A. 5065

QUESTIONNAIRE

Chief executives of organisations using META (Management Enhancement Team Approach)

The purpose of this questionnaire is to seek information about META from Chief Executives of organisations using META. Your response will complement the information being sought from State Coordinators, advisers and a sample of participants in the META program.

This national evaluation will assist in determining the impact of META and in future decision-making. In using items of information from this questionnaire your specific organisation will not be identified.

Please tick the appropriate responses and add comments where indicated.

The following information is to allow the consultants to telephone you with any questions

Name of person completing this questionnaire ....

Organisation...Phone no.....................

Questionnaire

C1 We are interested in how you feel META compares with other professional development activities which have been used previously within this organisation. In relation to the best of such programs with similar aims, is META in your opinion:

1 superior to other such programs .... ☐

2 much the same as other programs .... ☐

3 inferior to other programs .... ☐

4 unable to say .... ☐

C2 Please indicate which program(s) you are comparing META with

....

....

C3 Which of these programs are currently in use in your organisation?

....

....

C4 Other comments regarding META and other programs

....

....

....

C5 What level of support do you believe that META requires from the executive staff of the organisation?

1 high level.. ☐

2 medium level.. ☐

3 low level... ☐

Comment...

....

....

C6. In what ways has your organisation supported the META program?

....

....

....

C7 Please mention any further support from within cr outside your organisation that you feel to be desirable.

....

....

C8 META costs appear to relate to such matters as providing an adviser and staff time for meetings. Do you consider that META in relation to programs with similar aims seems to be:

1 less cost effective.. ☐

2 more cost effective.. ☐

3 much the same.. ☐

4 unable to say.. ☐

Comment..

....

C9 How compatible does META appear to be with the direction in which you wish your organisation to be moving?

1 very compatible.. ☐

2 reasonably compatible.. ☐

3 not at all compatible.. ☐

C10 How well has META helped to facilitate cultural change across the organisation?

1 considerably.. ☐

2 to a fairly great extent.. ☐

3 to a reasonable degree.. ☐

4 minimally.. ☐

5 not at all.. ☐

6 future impact only.. ☐

7 unable to say.. ☐

Comment..

....

....

C11 The use of META is intended to result in positive outcomes for the individual, the team and the organisation. From your general observations, would you rate success in each of these as: (Please circle)

1 for the individual:	high	medium	low
2 for the team	high	medium	low
3 for the organisation	high	medium	low

Comment..

....

....

C12 Have you any evidence of the eight best practice principles of professional development (as expressed in the META kit) being present in the META team activities?

1 supports the strategic & business plans of the organisation .... Yes/No

2 meets the needs of the organisation, the team and the individual......... Yes/No

3 encourages diversity and flexibility in learning strategy........................ Yes/No

4 is competency based.. Yes/No

5 is team oriented.. Yes/No

6 articulates with accredited education and training and recognises RPL .... Yes/No

7 incorporates equity and promotes cultural diversity............................... Yes/No

8 is career long.. Yes/No

Examples?...

....

....

C13 META has been used in various organisations with several kinds of teams. Please indicate for each of the following whether this kind of team has been used with META in your organisation and whether this type of team proved suitable for the task.

		In your Organisation?		*META suitable for this type of team?*		
	Type of Team	*Yes*	*No*	*Yes*	*No*	*Unsure*
1	Senior Management Team					
2	Team of Managers					
3	Current Work Unit					
4	Special Project Team					
5	Other....................................					

Comment...

....

....

C14 What have been any major benefits you have noticed from META?

....

....

....

....

C15 What have been any major difficulties or problems you have noticed related to META?

....

....

....

....

C16. Do you intend to encourage further development of META in your organisation?.. Yes/No

Reason(s) ....

....

....

....

C17 Any other comments you wish to make about META.

....

....

....

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....

....

Thank you for your help. Would you please return the questionnaire by 10 March, 1997 to:

Evaluation & Development Services Pty. Ltd.
Box 376, Glenside, S.A. 5065

Questionnaire to Team Members

As a participant in the META program you are asked to respond to the items below in the brief questionnaire. The information you provide will be added to other data obtained from a variety of sources (such as the State/Territory Coordinators and local evaluation/project reports, and other questionnaires completed by advisers, directors of organisations and selected case studies of individual organisations using META).

A1. Name of Organisation..

A2. Please indicate the extent of you agreement with each of the statements below by circling the relevant symbol. An opportunity for you to add further comments is provided at question A4 below.

Key:
Strongly Agree (SA)
Agree (A)
Undecided (U)
Disagree (D)
Strongly Disagree (SD)

A2.1 The META project has assisted us in the pursuit of strategic goals .... SA A U D SD

A2.2 The META process was easy to understand.................... SA A U D SD

A2.3 The META process has contributed towards changes in the culture of this organisation. .... SA A U D SD

A2.4 I have developed my competencies or added to existing competencies through the META project.......... SA A U D SD

A2.5 META has contributed to team competencies................ SA A U D SD

A2.6 META has helped me in planning for further professional development. .... SA A U D SD

A2.7 META has been manageable in the time available........... SA A U D SD

A2.8 The META team process is relevant to my role in this organisation... SA A U D SD

A2.9 META compares favourably with other management development programs I have experienced...................... SA A U D SD

A2.10 Please name the programs you are comparing META with in A2.9 above:........................ SA A U D SD

A2.11 Resource material provided in team sessions has been relevant to the team's needs........................ SA A U D SD

A2.12 I am pleased to have been involved in the META process........................ SA A U D SD

A2.13 The project/task the team has been working on has been satisfying to me........................ SA A U D SD

A2.14 META has contributed to team's ability to achieve its goals........................ SA A U D SD

A2.15 During the life of the project, the team is operated more effectively because of the META process........................ SA A U D SD

A3. Do you intend to get your competencies which were developed in META recognised in another program?........................ Yes No Unsure

A4. Additional comments..

....

....

....

....

....

....

Further information about this evaluation can be obtained from the evaluator's newsletters distributed to State/Territory coordinators, and then to advisers.

Please put the completed questionnaire into a sealed envelope and return it to your META adviser. the adviser has been asked to return the questionnaires unopened to the consultants.

QUESTIONNAIRE

To Organisations that have Expressed Interest in the Management Enhancement Team Approach (META)

We have been informed by a State or Territory Vocational Education Authority, or through the Australian National Training Authority that you or one of your staff expressed interest in the Management Enhancement Team Approach (META).

This program is being evaluated nationally, and this questionnaire seeks to find the reason for your interest and what action you have taken since. Any information you provide the consultants will remain confidential.

Name of Person completing questionnaire..

Organisation...Contact Phone Number...........................

E4 How did your organisation find out about META? (Tick appropriate box

E4.1 From professional contacts.. ☐

From State Vocational Education Authority:

E4.2 Newsletters.. ☐

E4.3 Invitations to apply for funding.. ☐

E4.4 At the META launch.. ☐

E4.5 Other (please describe)... ☐

E5 Has your organisation used META or parts of the META materials?.. Yes/No

Reasons..

....

E6 If you have used META, are you willing to answer a more detailed questionnaire, if contacted? .... Yes/No

E7 Is your organisation likely to use META or parts of the META materials? .... Yes/No

If so, please explain ....

E8 Other comments ....

....

....

Please send your completed questionnaire by 10 MARCH 1997 to:

Evaluation & Development Services Pty Ltd, PO Box 376, Glenside, SA, 5065
Additional text from sections

Australian National Training Authority
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